5-1-2011

Creating and Maintaining a Shared Organizational Vision Through Effective Communication

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Abstract

As organizations face rapidly changing and increasingly complex issues, it is critical they take advantage of potential opportunities to maintain their impact over time. This paper explores the discursive methods that support the co-construction, evolution, and transmission of organizational values and vision. It was theorized that if Large Group Design (LGD) principles are applied as an organization goes about its everyday work, it would be possible to develop a shared understanding and generational enculturation of organizational values and vision. Two large-scale interventions were conducted with the Bureau of Autism Services, PA Department of Public Welfare, through an action research project designed to test the effectiveness of the approach. It was determined that consistently applying large-scale principles throughout the planning and implementation process has an impact on the outcome of an intervention effort. Even when implemented imperfectly, the application of large-scale intervention principles to an organization's everyday work is an effective approach for systems looking to inculcate values and maintain their impact over time. This research has considerations for organizations designing Large Scale Meetings (LSM) for their own unique purposes.

CREATING AND MAINTAINING A SHARED ORGANIZATIONAL VISION

THROUGH EFFECTIVE COMMUNICATION

by

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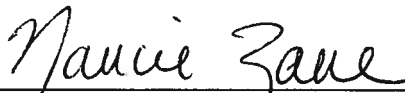
Submitted to the Program of Organizational Dynamics
in the Graduate Division of the School of Arts and Sciences
in Partial Fulfillment of the Requirements for the Degree of
Master of Science in Organizational Dynamics at the
University of Pennsylvania

Philadelphia, Pennsylvania

2011

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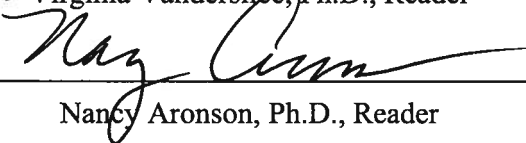
THROUGH EFFECTIVE COMMUNICATION

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ABSTRACT

As organizations face rapidly changing and increasingly complex issues, it is critical they take advantage of potential opportunities to maintain their impact over time. This paper explores the discursive methods that support the co-construction, evolution, and transmission of organizational values and vision. It was theorized that if Large Group Design (LGD) principles are applied as an organization goes about its everyday work, it would be possible to develop a shared understanding and generational enculturation of organizational values and vision. Two large-scale interventions were conducted with the Bureau of Autism Services, PA Department of Public Welfare, through an action research project designed to test the effectiveness of the approach. It was determined that consistently applying large-scale principles throughout the planning and implementation process has an impact on the outcome of an intervention effort. Even when implemented imperfectly, the application of large-scale intervention principles to an organization's everyday work is an effective approach for systems looking to inculcate values and maintain their impact over time. This research has considerations for organizations designing Large Scale Meetings (LSM) for their own unique purposes.

ACKNOWLEDGEMENTS

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CHAPTER 1

INTRODUCTION

<u>Background</u>

In 1928, American philosopher W.E. Hocking said, "There is a deep tendency in human nature to become precisely like that which you habitually imagine yourself to be" (Peale, 1982, p. 155). When he professed this belief, he was offering a glimmer into the dialectical idealism he became known for in the early 20th century. Not only did he believe the potential of an individual is limited only by the boundaries he sets for himself, but he understood a concept that is broader still: the importance of people making connections not only to each other but also to their communities and the extended world they live in (Lachs & Hester, 2004).

A person should not only look forward, however. For an individual to know where he is going he must first know where he comes from; Hocking also emphasized the need to understand historical and cultural contexts in considering the larger picture (Lachs & Hester, 2004). In other words, when an individual is visualizing himself in a future role or situation the entire environment should be considered, for every decision an individual makes affects the dynamic of the whole that is created.

The world can be viewed as an interconnection of people and their environments, and existence as a culmination of experiences, each piece building upon another in the complex jigsaw of one's being. This philosophy applies not only to individuals but to organizations as well. This belief has been reinforced for me over the past five years by personal experiences, coursework, and shared discussions with colleagues from diverse professional fields.

My professional career path has provided me with the opportunity to work in a myriad of roles and settings, all of which have involved coaching or mentoring, program and curriculum development, and facilitation of diverse groups with divergent perspectives. In 2005 my skills in these areas were tested when I joined a small team setting up a new governmental office in Pennsylvania that would support adults with autism. The level of work we were doing pushed me to discover new and better ways to approach the tasks at hand, and I realized that it in order to continue to grow professionally it would be necessary to expand my toolbox of resources. In January 2008 I enrolled in the Organizational Dynamics (OD) Master's degree program at the University of Pennsylvania, and the benefits unveiled themselves before my formal coursework even began.

During the January 2008 Spring OD Brunch, the keynote speaker[1] shared methods to generate innovative solutions to complex organizational issues, and his talk seemed to illuminate an emerging professional concern. Two years earlier, I'd been asked to put together a full-day cross-sector meeting to generate discussion around the increasing intersections between individuals with disabilities and the justice systems. Elaborate invitations were designed, pens were ordered, and the sign language interpreters ensured that the former Governor's lunchtime keynote complemented the elaborate buffet. The meeting was a disaster.

When various sectors were asked to show their hands in representation of their stakeholder groups the sinking feeling began. It settled like a rock when the dearth of movement silenced the room and the hosting Secretary of Public Welfare proclaimed, "The fact that these people are not here is exactly why we have a growing problem in

Pennsylvania." But I knew assuming there was a lack of interest in the issue was not exactly accurate. They were not there because we had not invited them.

The following year I had the opportunity to apply my growing awareness of stakeholder involvement to a new meeting. This time the goal was to bring together high-level policy makers from around the country to discuss the current state of autism services on state and federal levels, and based on my prior experience every effort was made to get the right people in the room. This meeting was better. Presentations were made, people interacted in topic groups, and follow-up reports were written and disseminated. The feedback indicated it was a successful meeting, but in my perspective all we had ended up with was a list of problems and no solutions. I still thought there had to be more effective ways to engage people around common issues.

At the time of the Spring OD Brunch, I was in the process of planning the next opportunity for the same group of policy makers to come back together, this time to develop creative solutions to the issues that had been identified the previous year. My role had also expanded from simply planning the logistics, and this time I was able to make recommendations to restructure the format of the discussion groups.

At the end of the brunch I approached the presenter with a number of questions, and to my enthusiastic relief he volunteered his experience as a sounding board and advisor over the course of the next two months. The external guidance provided me with a new level of professional confidence to design the meeting's multiple components, and further expanded my thinking beyond stakeholder considerations to the instrumental role of the facilitator. This meeting generated reports with recommendations that made their way to Congress, and feedback was extremely positive. It seemed we were still missing

something, though, which I became more convinced of when the funding for future meetings disappeared and my focus was redirected to internal Bureau priorities. Efforts to share the leadership of the meeting outcomes and next steps led nowhere, and without a shared sense of ownership the energy that had been running strong to this point stalled.

This led me to think about many projects I had been involved in over the years that ground to a halt when one key individual left. The implications for our new Bureau left me with an anxious sense of opportunity, since I now had a means to see what I could learn about ensuring that our work would continue to endure. There had to be a way to bring people together so that the implementation of outcomes and future efforts were not dependent on a single source.

Throughout my Organizational Dynamics coursework I explored frameworks, models and strategies that could give me insight into the complexities of social systems. I immersed myself in research on executive coaching, power and politics, group dynamics, and communication styles. I tested methods to diagnose what I was observing, and received first-hand experience with a number of systems approaches designed to generate sustainable change. As professors introduced me to concepts such as Appreciative Inquiry (Cooperrider & Whitney, 2005), culture change and large-scale interventions I tried the techniques out and felt like I was on to something. Applying each new tool to my everyday work has resulted in an even deeper level of understanding about what is happening, and why it is occurring. My toolbox of resources has now grown to include multiple perspectives that help explain my experiences on individual, group and organizational levels.

In the development of a Capstone topic, I considered areas that were of the most interest to me, would have the greatest impact for my organization, and could potentially be generalized to benefit a wider audience. Everything circled back to my underlying philosophy that people and their environments are interconnected, and that lessons learned from the past can contribute to the development of a desired future. It was with these considerations in mind that I set out on an in-depth exploration of an approach to bring a cross-sector of people together to exchange ideas about an issue they each see as important, in a way that helps them co-create a better and shared future.

In determining the specific scope of my research, I considered where there were opportunities to apply the tools and resources acquired through my studies to effect change and positively impact the day-to-day challenges facing my organization. This led me to revisit the thread of questions about effective meetings and identify some lingering unknowns. My consistent interest in large-scale methods has evolved into an interest in how those methods can be applied to the communication of organizational values and the creation of a shared vision. Combining these considerations seemed to offer an approach that aligned with my personal philosophy, was flexible enough to be designed to fit my organization's culture, and could be tested for efficacy. This led to my guiding research question: How can Large Group Design (LGD) principles be applied to help an organization effectively articulate, communicate and deeply embed its vision and values so they are maintained as it evolves?

CHAPTER 2

ORGANIZATIONAL CONTEXT

Bureau of Autism Services Overview

The Bureau of Autism Services (BAS) is a governmental organization in its fifth year of existence. The Bureau and the programs they are designing are truly innovative. As the first state agency in the country created to administer programs specifically designed to support adults with autism, it is providing a blueprint not only for Pennsylvania but for the nation at large.

For the first three years the staff remained small, operating with part-time hourly contractors and two to three salaried staff members. Each of the founding members and two of the subsequent employees brought into the system had a personal connection to autism. Because they were such a small organization of individuals and had a shared understanding of the autism population, engagement around their vision and the methods of achieving it was part of the day-to-day practice. They had the characteristics of a start-up communal organization, with close ties outside of the office, a small number of goals (including survival), and a strong sense of solidarity around the clear, collective benefits of success (Goffee & Jones 1996). As a result of these combined circumstances, the vision the Director had was easily transmitted and a shared set of values and sense of mission developed fairly naturally.

Over the past two years BAS has grown to a staff of 38 individuals spread out around the state and some staff members who were part of the initial implementation stage have left. The staff now consists of both salaried and hourly contractors, and others are state employees. The background experiences, frameworks, and values they bring

with them are very different in nature. This has created new communication challenges and some internal tensions. If the Bureau is to maintain its impact as the organization evolves over time, it is important that it identifies effective communication strategies to develop a shared understanding and generational enculturation of organizational values and vision.

During the December 2009 in-service, staff members were asked why they decided to work for BAS. The primary theme that surfaced through this dialogue was the desire to be part of something new. It also emerged that staff looked at employment with BAS as an opportunity to work in an environment that encouraged their personal growth and involvement. This insight into what seems to be a shared value provides the organization with a place to begin building additional communication opportunities.

I, myself, have been part of the Bureau of Autism Services (BAS) staff since the beginning and have a pre-existing history working with our Director. My position supports the overarching organizational goals, and I work with multiple internal and external offices, teams and individuals implementing or affected by our initiatives. My main responsibilities include oversight of our statewide Communication, Outreach and Training initiatives (both internal and external). This includes plans for staff development, staff orientation, meeting design, and communication strategies.

Considerations in the Larger System

Formed as the result of the 2004 Autism Task Force Report Recommendations, the creation of the Bureau of Autism Services (BAS) resulted in systemic restructuring within the PA Department of Public Welfare (DPW). A new Office of Developmental

Programs (ODP) was created, and BAS was housed within the new office. Additionally, a pre-existing office, the Office of Mental Retardation (OMR), was also shifted into the ODP container. OMR was then renamed the Bureau for People with Intellectual Disabilities (BPID). The two Bureaus currently function as completely separate offices within ODP. A large-scale assessment process is underway with the guidance of an external consulting company to identify areas where these entities can begin to operate more cohesively.

During the timeframe of this project gubernatorial elections have taken place, and the key political figures who have been staunch supporters of the Bureau's initiatives are no longer in their positions. The state leadership, including many people in the Department of Public Welfare (DPW), is being replaced with individuals who it is anticipated are unfamiliar with the autism community and the positive impact the Bureau's adult service programs are having in supporting them. The expectation is that they will view the Bureau's initiatives with a different level of priority than the former administration which was instrumental in the creation of a government agency focusing on autism services. Early indications are that this administration is also deeply interested in streamlining resources across systems. Major changes for state systems are also imbedded into the Federal Health Care Reform, and determining how the multiple considerations will impact Pennsylvania is under discussion.

Changes outside of the Bureau's control are occurring on system-wide, statewide, and national levels simultaneously. The combined circumstances have the potential to influence the budget, staffing structure, and overall vulnerability of the initiatives recently put into place. Anxiety and concern about job security and the impact these

factors could have on the Bureau is a regular topic of conversation in the hallways and break areas amongst the staff.

These considerations are beyond the scope of this paper and are provided simply as context for the focus of my research. However, the findings of my research on effective communication strategies as a means to develop a shared understanding and generational enculturation of organizational values and vision could have implications for the larger effort as well.

Looking Towards the Future

I believe that anything we set in place now should be, if at all possible, aligned with the organization's values and vision; developed with input from stakeholders; independent of specific individuals or processes; self-sustaining (independent of the availability of future resources); based on proven methodology (if applicable); and inclusive of strategies or methods that can be generalized.

Informal conversations with staff members at different levels of the organization indicate that there is not a consistent belief in how to prepare for the future. For example, the Bureau's Executive Leadership openly discusses the organizational values, as well as the benefits of peer-reviewed methodology and strategies that can be generalized, but individuals in other positions spend more time discussing their day-to-day tasks. While there seems to be general agreement that what we set in place should be independent of specific individuals, there are also indications that a competing value exists (Quinn & Rohrbaugh, 1981). It appears that some staff members prefer a top-down hierarchal

approach to leadership, and for some there is reluctance to share ownership of purview and responsibility.

When the reasons for the disparity were explored through informal discussion, two primary concerns surfaced. First, there is the persistent fear of state staff members that they will lose their positions to contractors if they share their current responsibilities with them. Contractors hold the reverse fear, that their jobs are more vulnerable; they tend, however, to view internal collaboration as having the potentially positive outcome of securing everyone's employment.

The second fear that some state staff members seem to hold is that they will lose input and participation in the projects that they care about the most and be restricted to the tasks outlined in their official job descriptions. Contractors do not hold the same concern, but there is a general lack of trust across the organization that the system will protect individual needs. These concerns present an opportunity for meaningful engagement around day-to-day responsibilities, especially as related to creating a shared vision for the organization based on commonly held values. The application of large-scale intervention principles offers a means to explore this potential.

CHAPTER 3

GUIDING QUESTION AND HYPOTHESIS

<u>Guiding Question</u>

How can Large Group Design (LGD) principles be applied to help an

organization effectively articulate, communicate and deeply embed its vision and values

so they are maintained as it evolves?

<u>Expanded Hypothesis</u>

A 1993 study conducted by Wyatt Company showed that during times of

organizational change effective communication strategies related to the vision and

mission of the company involved face-to-face interactive discussions (Larkin & Larkin,

1996). This meant engaging staff in dialogue rather than simply sending written materials

or bringing everyone together to listen to a presentation. Additional research shows that

candid communication with the people who can influence or are influenced by the

changes builds acceptance, early support, and full participation (Feldman & Spratt 1999).

Combined, these findings emphasize that simply bringing everyone into a room and

talking about values and vision is not enough to create a shared understanding and

enculturation of them. There must be a deeper level of engagement between the

stakeholders in order for a sense of ownership of the vision to develop.

The implication is that organizations need to select communication strategies that

consistently and purposefully engage stakeholders in effective and meaningful dialogue.

This may be reflected in everyday opportunities that are consonant with the on-going

agenda of the organization and/or represent a "systems event" in which stakeholders are

brought together for a specific task and outcome. The underlying principles of large-scale group methods, known as Large Group Design (LGD), provide a strategy to take advantage of these immediate and planned opportunities.

This paper will look at the role of human communication in the transference and preservation of vision and values within organizations. Since people together create shared meaning (K. Gergen, Schrader & M. Gergen, 2008) and the different lenses they wear shape their perspectives, it is important to look at the nature of vision and value-focused dialogue in an organization over time. Specifically, this paper will explore the discursive methods that support the co-construction, evolution, and transmission of organizational values and vision. It is predicted that if Large Group Design (LGD) principles are applied as an organization goes about its everyday work, then it is possible to develop a shared understanding and generational enculturation of organizational values and vision.

CHAPTER 4

LITERATURE REVIEW

<u>Key Words</u>

Organizational culture, culture change, generational enculturation, value transmission, espoused values, social constructionism (discourse communities), learning organizations, large-scale interventions

<u>Summary Introduction</u>

There are a number of theoretical concepts that reflect ways that today's organizations can create a shared sense of values and a vision based on those values. The question then becomes how an organization can transmit its shared values and vision across generations as it evolves. The challenge is that values tend to remain consistent, but the language used to describe those values changes (Rokeach, 1986; Williams, 1979; Young & Harrison, 2004). Organizations that want to maintain their impact over time need to find methods to make their organizational values resonate in a way that continues to be relevant to new generations (Gee, 2011; Gergen, 1999; Rokeach, 1986). To maintain relevance an organization needs to create an environment that holds its primary vision and values; at the same time, the environment must allow the organization's members to continually co-create a sense of meaning that links to their individual understanding of those values (Argyris & Schon, 1996; Cheney, 1983; Cheney & Tompkins, 1987; Senge, 1990).

Addressing these challenges is often seen as a management issue for an organization's leadership. Organizations are social systems, however, with differing perspectives and experiences continually developing at individual, group, and system-

wide levels (Jackson, 2003; Young & Harrison, 2004). Each frame of reference impacts an organization's ability to address challenges and effect change (C. Heath & D. Heath, 2010; Martin, 2002). These coexisting viewpoints also influence how organizational values and vision are understood and applied as members go about their everyday work (Cheney, 1983; Rokeach, 1986; Williams, 1979). Organizations therefore face the challenge of identifying a method for creating shared meaning by looking at a situation from different angles, and combining the diverse perspectives of its members on an on-going basis.

Viewing organizational culture from a three-perspective framework (Martin, 2004) provides insight into how and why meaning is socially constructed through organizational discourse (Fairclough, 2001; Gergen, 1999; Young & Harrison, 2004). The combined findings emphasize the importance of creating a learning environment that enables an organization to take a systemic approach to purposeful dialogue around its values and vision (Argyris & Schon, 1996; Senge, 1990).

Selecting communication strategies such as large-scale interventions (Aronson & Steil, 2010) provides a means for an organization to take advantage of both immediate and planned opportunities for purposeful and effective dialogue around its values. This in turn increases the likelihood of creating a shared understanding of and commitment to organizational values and vision that will continue across generations. This is especially relevant for organizations that hope to inculcate their values and maintain their organizational impact over time.

Organizational Culture

Theories on organizational culture range from the viewpoint that culture is just one manipulated variable within an intricate system to the concept that organizations are themselves socially constructed cultures (Meyerson & Martin, 1987). Organizations are complex, however, and taking a single or simplified approach to organizational culture risks missing information that can provide insight into those complexities. Martin (2002) recommends taking a three-perspective view of culture if a more comprehensive understanding of a situation is to emerge.

One prevalent view of culture is the integration perspective. Schein (2004) takes this approach, defining culture as the shared set of implicit assumptions that a group holds and that determines how it perceives, thinks about, and reacts to its various environments. From his view culture is deeply-rooted and forms over time based on an organization's interpretation of what has proven to be successful. Originating from top leadership, cultural assumptions underpin an organization's values and beliefs and have pervasive effects on the actions of its members (Heracleous, 2001).

An alternative way to look at culture is from the differentiation perspective, which defines it as comprised of multiple subcultures that overlap and coexist (Martin, 2004). For instance, subgroups may be determined by hierarchy and department structures, the length of time people have been employed, or gender affiliations (Meyerson & Martin, 1987). Individuals are likely to be members of multiple intersecting and nested subcultures, some of which hold opposing viewpoints. As a result, consensus around factors such as values and behavior are not assumed across an organization's membership. Harmony is only evident within the boundaries of subcultures, and conflict,

differences and ambiguities often surface where different subcultures intersect. A dominant organizational culture emerges only from the shared core values between those diverse groups (Martin & Siehl, 1983). In other words, culture may be initiated from an organization's leaders but it is negotiated at the subgroup level.

A third definition emerges from the fragmentation perspective of culture. From this view, the defining feature of an organization's culture is ambiguity (Martin, 2004). Because the issues facing organizations are complex and always in flux, system-wide agreement is not possible. Consensus is reached only around specific issues, and cultural interpretations of values and beliefs are not consistently agreed upon nor consistently in conflict (Feldman, 1991, p.154). As a result, there are multiple views on most issues and changing interpretations of situations is common (Martin, 2002).

At first it may appear that even when a three-perspective framework is taken, one cultural perspective may seem more relevant than the others (Martin, 2002, p.159). At any point in time, however, all three perspectives have relevance to an organization and combined can provide a deeper understanding of the challenges it faces.

Culture Change

Influencing or changing an organization's culture has challenges no matter which perspective it is viewed from, and the challenges multiply when change is considered from a three-perspective framework (Martin, 2004). Yet there is value in doing so because it is possible to attain a more complex understanding of organizational issues when they are studied from all three cultural contexts (Martin, Frost, & O'Neill, 2004).

From the integration perspective, cultural change is an organization-wide initiative initiated internally by leaders, where a new unity around aspects like values and vision replaces the old one entirely (Martin, 2004). Since from this view behaviors, values, beliefs and assumptions are interconnected aspects of an organization's culture, as a coherent whole they are resistant to change efforts (Heracleous, 2001). This creates the risk that an organization viewing its change initiative solely from the integration viewpoint may assume there is more consensus and understanding of new espoused values, for example, than there actually is.

From a differentiation perspective cultural change does not transpire on an organization-wide scale. Environmental pressures trigger change efforts and as a result change only occurs in subcultures impacted by the external factors (Martin, 2004). Change is not always planned and the rate of change, the kind of change, and interpretation of the change varies throughout an organization (Meyerson & Martin, 1987). The implication is that an organization considering a planned, top-down, organization-wide change effort should expect and be prepared to deal with different responses and interpretations within its subcultures.

Cultural change from the fragmentation perspective is always occurring, is fairly invisible and cannot be controlled at all (Meyerson & Martin, 1987). Rather than being seen as an event that intermittently interrupts an organization's everyday work then stabilizes, from this view it is triggered solely by environmental factors with no specific point of origin (Martin, 2004). Individual members have little or no impact on the outcome (Martin, 2002, p. 149). Taken in isolation, this perspective creates serious

challenges for an organization looking to purposefully influence the way its members interact around aspects such as creating shared values and a shared vision.

Most general theories of influence or change accept the premise that change does not occur unless an individual is motivated and ready to change (Shein, 1961). This implies that the members of an organization must believe the culture change is both necessary and possible, and will move the organization in a direction that is aligned with the individual's perception of the organizational values and vision.

One effective strategy in influencing perceptions of change efforts is through examples of small changes that have had positive effects (C. Heath & D. Heath, 2010). When individuals can see that things are working as a result of new behaviors it influences the meaning they make from messages communicated across situations, which can then influence changes in their thinking and future actions. This is relevant to all three perspectives on culture, as it can impact how an individual interprets a specific issue (fragmentation perspective); increases the likelihood of consensus across subcultures (differentiation perspective); and provides top leadership with evidence of success (integration perspective) (Martin, 2002).

Generational Enculturation

One area of cultural change an organization may look to influence is the extent to which its members understand and commit to its values and vision. Schein (1989) notes that culture itself is capable of being learned and transmitted through the inculcation of an organization's core values and beliefs. He further notes that values are instilled through both formal and informal systems.[2] Even though Shein is working from an integration

perspective (Martin, 2004), formal and informal systems are also representative of an organization's coexisting subcultures and areas of fragmentation. The implication is that an organization should identify a variety of means to consistently and purposefully communicate and instill values, and therefore influence its culture, as it goes about its everyday work.

Additional approaches that have proven to be effective in communicating organizational values incorporate strategies that develop an individual's sense of identification with the organization (Cheney, 1983). Organizational identification considers how the communication within an organization simultaneously shapes the identity of the organization and its members and how that identity thereby influences the contributions an individual makes to the organization. Like culture, identity is therefore not something an organization has but something that is co-constructed through dialogue around shared interests (Cheney & Tompkins, 1987). This indicates an opportunity for organizations to select communication strategies that create an organizational identity consistent with its current or desired culture, including its values.

Value Transmission

Williams (1951) defines an institution, or organization, as having a set of institutional norms that cohere around a relatively distinct and socially important complex of values. These values can be thought of as enduring beliefs that serve as a standard to guide an organization's actions and attitudes, and further guide how it evaluates and justifies its own actions and then compares its actions to that of others (Rokeach, 1986). In other words, values influence the way people think, feel and behave,

and therefore become the criteria that an organization as a whole uses when determining a course of action (Williams, 1979). An organization's members must therefore understand and be committed to these values and able to apply them to enormously varied situations that surface in their day-to-day work.

It is important for members of an organization to have a shared understanding of these values. Values are learned and develop through experience (Williams, 1979) so people need opportunities to develop a shared sense of organizational values through shared experiences. Cheney (1983) notes that participation in an organization increases the likelihood that an individual will identify with and accept its values and goals; as a result, the interests of the individual and the organization will overlap or coincide. This in turn increases the likelihood that individuals will develop a commitment to these values and apply them as they go about their everyday work.

One key consideration is that even when there is a shared understanding of and commitment to values, values are not concrete rules of conduct (Williams, 1979). Values do, however, guide conduct across specific situations, and also enable individuals and organizations to visualize beyond immediate goals to more ultimate end-states of existence (Rokeach, 1986). The implication for evolving organizations is the need to select effective communication strategies that develop a shared understanding and generational enculturation of organizational values and vision.

Espoused Values

A 1993 study conducted by Wyatt Company noted that 68% of large companies consider mission and values to be their number one communication priority (Larkin & Larkin, 1996). In this same study it was found that most managers, given the chance, would change the way they had communicated with their employees during periods of major organizational change. Simply espousing their values and vision for the company was not effective. Alternatively, that approach often resulted in increased resistance if what was actually happening in day-to-day practice did not match the values being communicated verbally. These findings indicate that if, for example, an organization espouses collaboration and partnership as part of its mission, then the methodology used to communicate its mission and vision should model those espoused values.

As noted in the earlier section on generational enculturation, Cheney (1983) has shown that effective approaches in communicating organizational values are ones that focus on developing an individual's sense of identification with the organization. Specifically, they represent forms of the common ground strategy, a direct, associative process that overtly links the interests of individuals and the organization with each other (Burke, 1973). For instance, one strategy an organization can use to illustrate and communicate its cultural values during times of change is the use of stories (Cameron & Quinn, 1999). Stories can lead people to understand their personal connection to the values of the organization, and also help them to relate to each other (Denning, 2005, p. 131). Together, they then begin to socially construct a shared meaning about what is happening around them.

<u>Social Constructionism/Discourse Communities</u>

        Social constructionism encourages people to view themselves in terms of their relations to others and coordinate those relations in the development of shared futures (Gergen, 1999). When viewed as a social construction, language influences the contexts in which it occurs, and in turn those contexts influence the language that is produced (Young & Harrison, 2004). How people choose to represent and construct dialogue when interacting is therefore important.

        The words people use and the actions they take in any given situation can be termed as discourse (Fairclough, 2001). Discourse implies face-to-face communication that occurs within a social context. In an organizational setting, language can be an effective tool in helping the organization and its members signify what is important, develop relationships and connections on multiple levels, and build a shared identity to guide actions (Gee, 2011). Language can also be a cultural tool to balance out power relationships in social interactions (Hicks, 1996).

        As related to social constructionism, organizational discourse is best defined as "the principal means by which members of an organization create a coherent social reality that frames their sense of who they are and is both an expression and a creation of organizational structure" (Mumby & Clair, 1997, pg. 181). It follows that since organizations set the structure for the day-to-day interactions of their members, they are discourse communities by design (Ashcraft, 2004).

        The power of language in the construction of meaning has implications for an organization designing opportunities for engagement around its values and vision. The potential for dialogue to mediate power relations has specific value in understanding the

large-scale design principle of creating equal standing among participants. The foundation of learning organizations provides insight into ways organizations can design a framework that enables them to create those opportunities naturally.

Learning Organizations

Senge (1990) defines a learning organization as one that is continually expanding its capacity to create its future. He broadens this definition by describing learning organizations as those "where people continually expand their capacity to create the results they truly desire, where new and expansive patterns around thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together" (pg. 3). In other words, members of a learning organization are encouraged to think creatively as they go about their day-to-day work without restrictions.

While Senge focuses on creating a learning environment where the people are doing the learning, Argyris and Schon (1996) think of an organization as a whole as doing the learning. In their perspective, an organization is learning when its members are in organizational roles acting on behalf of the organization. In order for learning to continue over time, an organization must create a culture where mistakes are considered opportunities for feedback and growth and its members are not penalized for reflecting critically upon their individual contributions to organizational problems (Argyris, 1991).

Senge (1990) outlines five critical disciplines that an organization should apply to its day-to-day practices in order to create a learning culture. The first is to look at an organization as a system. Jackson (2003) defines a system as a complex whole, the

functioning of which depends on its parts and the interactions between those parts. According to Senge (1990), systems thinking is a discipline for surfacing the structures, patterns and assumptions that underlie complex situations, and for discerning levels of change. Approaching organizational initiatives from a systems thinking view therefore provides a conceptual framework for the integrated implementation of the remaining four disciplines.

Two additional disciplines that Senge (1990) deems necessary for the development of a learning environment are to encourage personal mastery and professional growth in its members, and to create opportunities for teams within the organization to learn together through shared dialogue. He differentiates between the term *dialogue*, defined as the open and frank exploration of a particular subject or resolution of a problem that enables a group to access a larger pool of meaning (Fairclough, 2001; Senge, 1990; Merriam-Webster's, 1966), and the term *discussion*, defined as the back-and-forth process in which the pros and cons of a subject are considered with the outcome of a prevailing perspective (Senge, 1990; Merriam-Webster's, 1966). This distinction has increased relevance when considered within the context of the fourth learning environment discipline, which is for organizations to build a shared vision of the +future and a genuine commitment to that vision with the input of its members.

The fifth and final discipline Senge (1990) indicates is important in the creation of a learning culture is to surface the mental models, or world views, that organizational members use to interpret the environment around them. Doing so unearths ingrained

assumptions and beliefs that have developed through people's experiences and may influence their day-to-day actions.

One strategy an organization can use to incorporate these disciplines into everyday practice is to encourage the development of informal learning networks (Senge et al., 1999). Informal learning networks generate the exchange of ideas, promote a shared understanding of the challenges an organization is facing, and facilitate the emergence of shared values and organizational norms (Trist, 1983). Providing a means for the exchange of dialogue within and across layers of an organization also enables the organization to tap into the diverse knowledge and experiences of its members (Herriot & Pemberton, 1995). As a result, the existence of informal networks increases the possibility of finding innovative solutions to shared problems and proactively shaping a shared vision of the future based on organizational values (Morgan, 2006).

Large-Scale Interventions

Informal learning networks have an even greater chance of developing when an organization creates a means for the immediate exchange of dialogue as well as planned opportunities for engagement around organizational values (Senge, et al., 1999). According to Aronson & Steil (2010), Large Group Design (LGD) is a collaborative approach to meetings that involves the purposeful design of human interaction intended to build common ground towards enduring outcomes. This large-scale intervention,[3] which is embodied in Large Scale Meetings (LSM), is based on a set of core principles (See Appendix A1). By working from principles rather than a specific outcomes-based

model[4] the approach provides a flexible way for systems to develop coherence around complex issues (Barbeau & Aronson, 2006).

Defining a clear purpose for bringing a group of stakeholders together guides the entire process (Bridges, 2009; Bunker & Alban, 1997). Once that purpose has been identified, the whole system should be brought into the discussion from the earliest stages of planning (Emery & Trist, 1960). Representatives of all impacted stakeholder groups work together on a steering committee to map out systemic considerations and design the Large Scale Meeting (LSM) (Aronson & Steil, 2010; Emery & Trist, 1960). A larger group of the stakeholder communities that represent the system from multiple perspectives then participates in the meeting (Wesibord & Janoff, 2007). When designed well, the process helps to balance out power relationships (Hicks, 1996) and as a result the LSM provides a means for diverse values and perspectives to have equal standing and a chance to be heard. This is often a challenge for systems with stakeholders who may lack interpersonal trust (Bridges, 2009), are void of pre-existing relationships (Jackson, 2003), or that operate from a hierarchical power structure (Meadows, 2008).

Another guiding principle of LGD is that people must be allowed to plan for themselves (Jackson, 2003, p. 161). The steering committee clarifies the shared purpose of the larger meeting, identifies a specific task for participants to work on, and selects the activities that support that task. Together they ensure that everything included in the agenda is clearly tied back to the purpose. Furthermore, during a Large Scale Meeting (LSM) facilitation is minimal (Weisbord & Janoff, 2007). Groups are designed to self-manage, thereby increasing a sense of ownership and decreasing the dependence on an

external source (Ackoff, 1981). This means that participants serve as resources and are actively involved in dialogue as they work on activities together .

Just as the steering committee maps out systemic considerations during the planning stages, meeting participants engage in activities that create a shared understanding of the relevant context surrounding the issue being discussed (Aronson & Steil, 2010). The purpose of this principle is to help people identify with the whole system and not just their individual role within it (Flood & Jackson, 1991). As a result, it provides a way for internal stakeholders with different values and perspectives to develop shared meaning and to move past their individual biases (Cheney, 1983). Building activities designed around this principle into the initial flow element of the LSM provides a basis for the remaining activities selected to help the group achieve its purpose (Aronson & Steil, 2010).

By designing a meeting built upon Large Group Design (LGD) principles, participants are able to acknowledge the past and the present, but maintain a focus on creating a shared vision of the future (Aronson & Steil, 2010; Cooperrider & Whitney, 2005; Senge, 1990). This principle can also be described as providing people with a way to reach common ground, a place where participants are able to get past the current situation and make decisions based on what is good for the system in the long run (Weisbord, 2004). This does not unrealistically require everyone to agree on all points, but it does help people understand the diverse and often divergent perspectives of multiple stakeholder groups (Bunker & Alban, 1997; Meyerson & Martin, 1987). This in turn enables them to work from the commonalities that emerge across the subcultures that comprise the larger system (Martin, 2004; Martin & Siehl, 1983).

Opportunities for meaningful engagement are built into multiple stages of the planning process and throughout the flow of the entire LSM (Aronson & Steil, 2010; Bunker & Alban, 1997). This principle is critical because it is much more likely that the ideas generated through a large-scale intervention will be implemented and maintained if the stakeholders involved were the ones who came up with them in the first place (Rehm, 1999). When people within a system or an organization have had input throughout a change process and believe they have influenced the direction things are going in, the resistance to new ideas dissipates (Bridges, 2009, C. Heath & D. Heath, 2010). There is instead a vested interest in making sure the outcomes generated as a result of the task do not end with the meeting. Therefore, although team building is not a specific purpose of a Large Group Design (LGD), enhanced relationships and a sense of community are typical by-products (Aronson & Steil, 2010).

Relevance to Organizational Case Study Research

Each subset of the literature reflects aspects of what is being observed and experienced in my organization. How the subtopics relate to each other and the additional insight they provide when reviewed as a comprehensive set are proving to have particular relevance.

Within the Bureau of Autism Services (BAS), a lot of focus is put upon its underlying values and the important role they play in shaping the organizational mission, goals, and overall approach to the support of individuals with autism. The values are considered enduring beliefs that serve as a standard to guide the Bureau's actions, evaluation of its programs, and justifications for the priority placed on certain initiatives

(Rokeach, 1986, pg. 160). The Bureau's work ranges from the design and oversight of direct services to the development of professional training requirements and system-wide policies, all of which impact the quality of services provided to program participants and their families. Staff members at all levels and in all departments must therefore understand and be committed to these values and able to apply them to enormously varied situations that surface in their day-to-day work.

One of the Bureau's biggest challenges has been creating an environment where different and evolving sectors of the staff not only understand the organizational values and vision but also share them. Martin's (1994) three-perspective cultural framework provides a roadmap for understanding why it has not been an easy thing to accomplish. For instance, the organization is in a constant state of flux resulting from environmental factors out of its control, such as electoral changes to Pennsylvania's state administration.

The consideration of subcultures helps explain why the consensus that develops around specific projects doesn't necessarily generalize to other issues or day-to-day interactions. It has been informative to observe differing perspectives and experiences reflected in a number of overlapping subcultures.[5] It seems possible that the large-scale intervention principles could give the Bureau a way to encourage the emergence of a dominant culture that reflects the shared values between these subgroups that also align with the organizational values it is hoping to transmit. Taking a differentiation approach, for example, may generate the integration of a dominant culture based on shared values.

Overall, the combined research indicate that if people identify with their organization, and have a part in the social construction of meaning, the shared values that develop can guide conduct across specific situations and also enable individuals and

organizations to visualize a shared future. This is extremely relevant to BAS because it will continue to evolve as more is learned about the needs of individuals with autism. If the organization is to maintain its impact over time, it is essential to create a learning culture now that encourages new ideas and the development of informal networks so people have a way to share their changing experiences.

The combined research outlined in this chapter further indicates that to this end it is critical to plan specific system-wide opportunities for dialogue, such as large-scale interventions, where organizational discourse can occur around organizational values and vision. Although a detailed look at all of these factors is beyond the scope of this research project, the combination of formal and informal methods with immediate and planned opportunities could be the means to do so.

The concepts explored in this chapter have relevance to the action research approach taken for this project as well. Schein (1996) notes that concepts for understanding culture in organizations have value only when they derive from observation of real behavior in organizations; make sense of organizational data; and are definable enough to generate further study. Although this research project is not intended to directly assess organizational culture, the use of surveys and participant observation may provide cultural insights that help explain the findings.

Since the extent to which espoused organizational values are shared by individuals at multiple levels of an organization is an empirical question (Kabnoff, Waldersee, & Cohen, 1995), the use of surveys to measure the transmission of vision and values through two large-scale meetings is further supported. Consideration of the learning organization disciplines as they relate to large-scale design principles provide an

additional means of evaluating the effectiveness of the approach. For example, although the development of informal networks is not being directly measured, any observations of connections that develop during the timeframe of the research could potentially provide additional insight into the situation.

CHAPTER 5

METHODOLOGY OVERVIEW

Key Words

Mixed-methods research, empirical data collection, action research, participant observer

strategy, self as an instrument, large-scale interventions

General Methodology/Mixed-Methods Research

Researchers have a number of options when designing a process to develop and

test their theories about what is happening in an organization (Creswell & Clark, 2011).

For the purpose of this study, I chose an integrative action research approach that enabled

me to collect empirical data and also use my personal experience in the process as an

additional source of information.

According to the fundamental principle of mixed research (Johnson & Turner,

2003), the outcome of research that collects data through a combination of strategies is

superior to studies that only use one source of data. Having many sources of data enables

the researcher to capture a diverse range of divergent perspectives and make stronger

inferences about what is happening (Tashakkori & Teddlie, 2010). It is then possible to

gain a deeper understanding of the problem being researched and also gain insight into

the larger system which might otherwise be missed (Creswell & Clark, 2011). For

example, a researcher who only uses empirical methods to quantify responses about a

specific situation misses insight about the larger system that can be gained through open-

ended questions and observations. A blend of data-gathering techniques provides a better

test of how accurate a hypothesis is (McCormick & White, 2000) and enhances the validity of the findings (Harrison, 1994).

There are other benefits to using more than one method to collect data. When a combination of strategies is used to gain an understanding about a single situation, the results obtained from one method provide clarification into the findings from another (Greene, Caracelli, & Graham, 1989). Triangulation of the data sets can also enhance, discount or corroborate the information that emerges from each one. This can help a researcher identify systemic themes where there are points of convergence across data sets (Lawrence-Lightfoot & Davis, 1997).

Ultimately, it is a combination of multiple data sources that improves a researcher's ability to make discretions, prioritize and use the right data, and improve the level of insights gained throughout the process (Jamieson, Auron, & Scechtman, 2010). The researcher is able to benefit from the strengths of each method (Johnson & Onwugbuzie, 2003) which makes insights and findings more valid and trustworthy (Atkinson, Heath, & Chenail, 1991).

Empirical Instruments: Surveys

Empirical data collection is a specific, systematic method of collecting and recording data that researchers can use to evaluate and explain situations (Atkinson, Heath, & Chenail, 1991). Empirical tools help a researcher reduce bias in a multi-method process (Jick, 1979), collect information about a particular situation or issue (Alderfer, 1980), and gauge the effectiveness of the research approach (Creswell & Clark, 2011). When used within an organizational context, surveys in particular provide a way to

identify the needs of the organization's membership and also assess the impact of unique interventions (Cunningham, 1993).

Surveys are an efficient means of gathering data from a large sampling of an organization's members in a short amount of time (Levinson, 1972). Diverse individual perspectives can highlight areas of divergent thinking about a situation, and also help bring areas of agreement to light (Lawrence-Lightfoot & Davis, 1997). Multiple perspectives reflected through the survey help the researcher develop a more systemic understanding of the situation, which Jick (1979) states, "may also contribute to greater confidence in the generalizability of results" (p. 604).

Custom-built surveys specifically designed to the researcher's purpose contribute the greatest value to the process (Converse & Presser, 1986). Members of an organization are more likely to see the relevance of a non-generic survey and put more thought and time into their responses. It's extremely important that the survey format and the wording of the questions are designed carefully. For instance, the researcher should consider whether scaled or open-ended questions are most appropriate, and in what order those questions should appear (Fowler, 1995). Without this kind of attention to the survey design, the potential exists that questions will be interpreted differently and that responses will be distorted to reflect what people think is either expected or preferred.

Converse and Presser (1986) and Fowler (1995) recommend pretesting surveys to expose questions that are unclear or confusing or could be ordered differently to improve the survey's flow. This has relevance for researchers who conduct a study that tests an intervention across time in multiple settings, or who use pre- and post- surveys to measure the effectiveness of an intervention in a particular situation. The use of a pretest,

or pilot, enables the researcher to incorporate improvements into the consecutive version(s) without drastically impacting the validity of the results (Chenail, 2009).

The design of the empirical data collection process is as important as the design of the survey tools themselves (Fowler, 1995). Harrison (1994) emphasizes the importance for researchers to develop procedures to gather, store, and analyze data in way that maintains confidentiality and individual anonymity. A carefully developed process reduces the extent to which people distort their responses on written questionnaires and increases the level of honest feedback, which results in more valid findings (Fowler, 1995; Levinson, 1972). This is especially relevant when empirical data methods are integrated with informal sources of data within a mixed-methods action research process.

Action Research & Participant Observer Strategy

Action research[6] (Lewin, 1946, 1947) and the participant observer strategy (Bogdan, 1973; Chenail, 1992) are additional processes that enable researchers to work with others as designers and stakeholders in order to propose a new course of action for the goal of improving practices. These approaches provided me with strategies to conduct my research, define roles with the external consultant, and fulfill my work responsibilities. Participant observation specifically provided a means of managing my need to stay directly involved in the tasks while also collecting data as a researcher.

Action research is an iterative process that provides a way for researchers to blend practical organizational issues with theory and research (Maruyama, 2004, p.435). It is based on Lewin's[7] belief that a researcher's understanding of a situation emerges only when he actively tries to change it (Argyris, 1993). During the process, the researcher

actively participates in organizational activities, makes observations, and moves back and forth through different stages and components of the process as new information emerges. Because action research lends itself to multiple data sources, the approach can also be a means of evaluating the effectiveness of actions taken in an organization's search for collaborative solutions to its complex problems (Coghlan & Brannick, 2001). The new knowledge generated through the action research process can then also help guide the organization's future action on change initiatives.

Consideration of an organization's interconnected components as the process is designed and implemented is an underlying principle of action research. Emery and Trist (1960) emphasize the need for systemic interventions if change is to be sustainable since change in one part of a system affects the entire system. Argyris (1993) further notes that researchers must take a systemic approach to the design of the research by first framing the whole, then differentiating the parts. In other words, a researcher can't fully understand and make meaning about an issue by breaking it down and looking only at pieces of it. Understanding emerges only by considering how interrelated factors create the whole picture, and meaning is constructed only when this understanding resonates with people's experiences (Flood, 2010). It is expected that meaning will change as the process unfolds, which builds in the potential that the situation, and possibly even the research focus or methodology, will need to be redefined along the way (Small, 1995).

Gaining the cooperation and commitment of people in the organization with a shared interest in the issue is another key principle of action research (Cunningham, 1993), and contributes to a shared understanding of the situation. Ideally, the members of an organization are directly involved in the collection, analysis and application of the data

generated through an action research project (Lippitt, 1979). Heron and Reason (1997) refer to this as cooperative inquiry and add that people should work together to define the research questions and the methodology for exploring them. A fully democratic approach is not always possible, however, so the researcher may need to create a process to collect data from participants and provide feedback about the findings in a way that influences the resulting actions.

The importance of collaboration throughout the process has additional considerations for a researcher who is also a member of the organization where the research project is taking place. There are a number of advantages and disadvantages to conducting research within one's own organization, many of which are specific to relationships with colleagues (P.A. Adler & P. Adler, 1987). Most importantly, the level of cooperation and openness of the interactions between the researcher and the organization's members affects the validity of the data (Argyris, 1993).

For example, pre-existing friendships and associations with different individuals or groups in the organization influence the data received from them, and further impacts the data received from others that those people are networked with (Coghlan & Brannick, 2001). This applies to data collected through methods such as surveys or interviews but especially to feedback obtained through observations. This has implications for a third principle of action research, which is to test problems in the setting in which they develop through the observation of behaviors (Maruyama, 2004).

There is a difference between someone simply being observant of what is occurring in the surrounding environment, and the research act referred to as participant observation (Bogdan, 1973). The participant observer strategy is a qualitative method that

can serve as a check against the subjective reporting of the beliefs and actions of the organizational members engaged in an action research project (Chenail, 1992). During the process, the researcher actively participates in tasks designed to test the research questions and generate new information that will help the organization improve its practices.

The researcher keeps detailed field notes during the task, and afterwards records additional observations, opinions, reactions and feelings about the situation (Bogdan, 1973). The quality of information gleaned through participant observations is better overall when there are strong personal relationships between the researcher and other members of the organization (Cunningham, 1993). The established trust enables the researcher to blend into the background more easily and observe people as they really are.

Participant observers conducting research in their own organizations often encounter challenges in balancing dual roles (Wade, 1984). For example, internal researchers are sometimes engaged in action research for projects that they are responsible for as part of their everyday work assignments and that need to be completed regardless of whether or not the research inquiry takes place (Coghlan & Brannick, 2001). In this case it is important to differentiate between how the projects will be evaluated by supervisors based on the extent of their impact for the organization, and how they will be appraised separately for the quality of the inquiry and what knowledge is gleaned as related to the hypothesis. Clarifying these differences at the beginning of the process and revisiting the expectations at different stages helps honor both commitments and keep the boundaries between roles clear.

It is important to note that the amount of authority an inside researcher is given to conduct the project is also impacted by interpersonal relations (Coghlan & Brannick, 2001). This begins with gaining initial approval and continues through the presentation and application of the findings. Commitments made in early stages may change as new information emerges so renegotiating authority at different intervals of the action research process may be necessary to ensure its completion. Positive relationships and interpersonal trust help at these points. Positive relationships also increase primary and secondary levels of access[8] to information while strained or non-existent relationships restrict access to certain things. This, too, has implications for how the researcher engages with other members of the organization before, during, and after the action research project.

Interpersonal relationships are not the only factors that impact the success of an action research project. Organizational access and the validity of the data collected during an action research project may also be affected by how the research findings will be used (Coughlan & Brannick, 2001). This has specific implications for the inside researcher who conducts a project that aims to have a real impact and satisfy multiple needs. For instance, there may be a need to conduct research that contributes to personal career development, benefits the organization, and also contributes to general theory for the broader academic community through publication of the findings (Torbert, 1989).

This last need can especially create challenges in how much access is provided and how candid the feedback is since what is researched will be made accessible to audiences outside of the organization (Bartunek & Louis, 1996). Maintaining a sense of confidentiality, a sensitivity to organizational politics, and transparency around intentions

are therefore important so that the needs are balanced to benefit the researcher and the organization to the greatest extent possible (Torbert, 1991).

<u>Self as an Instrument</u>

The use of self as an instrument is a specific strategy within participant observation that helps a researcher explain empirical data and gain a better understanding of what is occurring in a situation. Specifically, it provides researchers with a beneficial means to collect a deeper layer of data about what is going on in an organization based on the links between the researcher and the larger system. It requires a pracitioner to maintain a connection to the larger group or organization while simultaneously remaining objective about the situation being observed (Smith, 1995). This can be challenging but if managed effectively can add a lot of value to the research process.

McCormick and White (2000) define the self as "the emotional, perceptual, and cognitive processes that make up a person" and the self as an instrument as a "means of becoming aware of and using these emotional, perceptual, and cognitive processes" (p. 50). They provide five methods to use your self as an instrument in organizational diagnosis, including the use of emotions as a source of data; observing initial perceptions; understanding personal biases; postponing judgment to avoid premature conclusions; and using images to create diagnostic hypothesis.

These methods have relevance even if the direct purpose of an action research project is not diagnosis. Being aware of the emotions that surface as data is being gathered can be a useful way for researchers to keep from becoming overwhelmed and manage feelings such as anxiety, confusion, elation or disappointment (McCormick &

White, 2000). Otherwise, unclear or unrecognized feelings have the potential to unintentionally influence the way that data is gathered (Chenail, 2009) as well as the kind of data that the researcher collects (M. Schwartz & C. Schwartz, 1955).

Managing anxiety and its resulting defensive behaviors is particularly important (Morgan, 2006). Left without an appropriate outlet, anxiety has the potential to permeate all phases of the process and therefore skew the interpretation of a situation (M. Schwartz & C. Schwartz, 1955). On the other hand, feelings like anxiety and disappointment can be converted into tools that indicate significant areas for careful observation and thought. For example, a sense of anxiety may indicate there are conflicts in the dual roles held by people conducting research in their own organizations (Coghlan & Brannick, 2001).

Feelings of surprise also serve as good indicators of areas that should be explored in more depth (Strauss & Corbin, 1990). They suggest that initial theories, assumptions about the situation, or expectations have not been met (McCormick & White, 2000). In this way they can serve as a safeguard from drawing premature conclusions about the situation. Additional insight can be gained when researchers work to discover why there is a sense of surprise that procedures and findings have not unfolded as envisioned by the researcher (Chenail, 2009).

Journaling is a specific way for researchers to capture the feelings and observation that emerge when the self as an instrument is used in an action research project. Through the use of techniques such as reflective journal writing (Rager, 2005), the feelings that are encountered by a researcher can lead to an initial or revised hypothesis of what is happening and add to a more accurate assessment and understanding of the situation throughout the research process (McCormick & White, 2000). Keeping field notes and

journals from the earliest stages of a project is critical, helping researchers capture not only preliminary emotions but also initial perceptions of the situation (Strauss & Corbin, 1990). These considerations are especially relevant for researchers that test their empirical data collection methods with a small sample group, because it provides an opportunity to make revisions before implementing them with a larger population (Chenail, 2009).

Journal writing can also help patterns and themes emerge over the course of the process (Barry, 1994), which has value since researchers who understand their common reactions and prejudices have a better chance of reducing bias in their findings (McCormick & White, 2000). Personal biases and untested assumptions may impact the research process, and journaling is an effective way to increase awareness of them (Torbert, 2004). Examples of the underlying influences that may surface include values and beliefs about human behavior, preconceptions, or more deeply ingrained cultural attitudes and stereotypes (M. Schwartz & C. Schwartz, 1955). Awareness minimizes the possibility that hidden biases and invalid assumptions will be built into empirical data tools (Chenail, 2009) and distorts the researcher's observations and interpretation of the data (M. Schwartz & C. Schwartz, 1955). Assessing potential researcher biases is particularly important for individuals conducting research in their own organizations because maintaining objectivity may be more of a challenge (Chenail, 2009).

Surfacing biases and assumptions can positively contribute to a researcher's understanding of a situation in other ways. Patterson and Zderad note that a combination of personal history and awareness can help a researcher form accurate perceptions, which increases the authenticity of data analysis and interpretation (as cited in Rew, Bechtel, &

Sapp, 1993). Strauss & Corbin (1990) note that personal and professional experiences help a researcher understand observations of events and actions more accurately and more quickly by providing a richer knowledge base to draw upon. In other words, when biases and assumptions have developed as a result of accumulated lifelong experiences they can work in the researcher's favor (Torbert, 2004).

Another strategy that benefits researchers using the self as an instrument is to pay attention to the images and metaphors that come to mind throughout the process (McCormick & White, 2000). Images that surface can be used in the management of meaning a researcher makes about specific situations as well as what is happening in the larger system (Morgan, 2006). For instance, recurring images can provide insight into power relations or organizational culture that may be impacting the focus area of an action research project. The metaphors and images that resonate as true provide insight into the central themes and perspectives they embody, and as a result provide layers of understanding into a situation that might otherwise be missed (Lawrence-Lightfoot & Davis, 1997).

Actively seeking to discover and explore the meaning behind the many factors that surface during the course of the research is a continuous process (M. Schwartz & C. Schwartz, 1955), and as these aspects emerge they should be considered and tested from multiple perspectives. The use of self as an instrument in the triangulation of data can be beneficial for this purpose (Seashore, Shawver, Thompson, & Mattare, 2004). For example, assumptions made through observation of a situation and that are based on emotions or prior experience may prove to be valid when empirical data collected

through a survey confirms them. Conversely, the survey data can prove those assumptions to be inaccurate.

Triangulating data also enables the researcher to look for points of convergence between different sources of data, and identify emergent themes that arise from framing one situation through different lenses (Lawrence-Lightfoot & Davis, 1997). In this way the use of self as an instrument can reflect information that might otherwise be missed in responses to preconceived categories within empirical data collection methods (McCormick & White, 2000). In fact, according to Jick (1979), "Qualitative data and analysis function as the glue that cements the interpretation of multimethod results" (p. 609). Overall, the use of the self as an instrument within a mixed-methods approach increases the plausibility of the explanations included in the researcher's analysis.

Large-Scale Interventions

For this project, a mixed-methods action research process was designed to test the effectiveness of large-scale interventions in helping to transmit an organization's values and vision. One of the key principles of both action research and large-scale interventions is the engagement of the organization's members throughout the process (Lippitt, 1979; Lippitt, 1980). In the context of action research, engagement means that the researcher and organization is committed to and experiences an identified problem related to change as it evolves (Cunningham, 1993, p.5). Similarly, large-scale group methods provide an opportunity for engagement as the researcher and other members of the organization combine resources and ideas to address a real issue as it is occurring (Bunker & Alban, 1997).

As support is negotiated for the overarching action research process (Coughlin & Brannick, 2001), it is critical that the researcher take the time to work with the organization's leadership to be sure there is a full understanding of the Large Group Design (LGD) principles outlined in Appendix A1 (Bunker & Alban, 1997). This is especially important in terms of stakeholder involvement,[9] facilitator identification and roles,[10] and commitment and follow-up to the meeting's outcomes. Internal researchers must also negotiate their role within this part of the action research process (Wade, 1984).

Once support for the approach has been confirmed, the researcher should work with a planning committee of stakeholders to identify issues that are relevant to the organization and for which people hold widely divergent views (Bunker & Alban, 1997). If an external practitioner is identified to support the meeting design and implementation, that person should be included in these discussions. Researchers working within their own organizations may find it beneficial to start with opportunities that they are already responsible for as part of their everyday work (Coghlan & Brannick, 2001, p. 43), and where they can gain the cooperation and commitment of people with a shared interest in the issue (Cunningham, 1993).

Aronson and Steil (2010) define a large group meeting design as "a sequence of working tasks that address the purpose of the large group meeting, one step at a time in small and large group formats" (p. 3). They note that once a relevant issue has been identified and the use of a large group approach has been agreed upon, it is necessary to narrow the scope for a Large Scale Meeting (LSM). This is accomplished by defining one clear purpose that guides the remainder of the process, including the design of the meeting's flow, selection of specific activities, and identification of the participants.

Examples of tools that outline LSM components and can aid in the planning process are

provided in Appendix A2.

CHAPTER 6

METHODOLOGY IMPLEMENTATION

Methodology Implementation Overview

Two primary initiatives within my responsibilities lent themselves to Large Scale

Meeting (LSM) designs (Aronson & Steil, 2010), were relevant to a cross-sector of

Bureau of Autism Services (BAS) stakeholders (Bunker & Alban, 1997), and fit within

the scope and timeframe of this paper. A timeline of each project is provided in Appendix

D. The first initiative was the design of a logo for the Adult Community Autism Program

(ACAP), one of two adult service delivery systems administered by BAS. The second

was the development of a new staff orientation program during a BAS staff in-service.

Since both of these were tasks that I was responsible for, they would have been on my list

to complete regardless of whether or not an in-depth inquiry took place (Coughlan &

Brannick, 2001). Fortunately, gaining the cooperation and commitment of colleagues and

the initial authority to take an empirical approach toward these projects was not a

challenge (Coghlan & Brannick, 2001; Cunningham, 1993; Heron & Reason, 1997).

Overall, the project proposals were received with support and interest.

Transparency about how the action research approach was connected to my

graduate work and how the findings would be shared externally was a critical factor in

gaining and maintaining support throughout the process (Bartunek & Louis, 1996;

Torbert, 1989, 1991). Clarifying expectations at different stages about how the outcomes

of the projects would be evaluated for various purposes also helped me honor multiple

commitments (Coghlan & Brannick, 2001). Openness around intentions and expectations

proved especially beneficial during negotiations to obtain approval to contract with an

external consultant in support of the staff in-service Large Scale Meeting (LSM). The involvement of an experienced practitioner ensured our organizational objectives would be met; it was necessary in order to balance my need to assist in the meeting design and implementation, while also collecting data through participation in the activities, as well (Chenail, 1992; Lewin, 1947; Smith, 1995).

As each action research component was implemented, additional factors continued to materialize from other areas of the organization and add meaning to what was being observed (Emery & Trist, 1960; M. Schwartz & C. Schwartz, 1955). The self as an instrument provided a valuable means to collect a deeper layer of data about what was going on as each new aspect came to light. The five methods McCormick & White (2000) describe provided a way for me to work with a clear self-concept, encouraged me to craft an understanding of why I was choosing the approaches I did, and helped me gain an appreciation of the values, assumptions and biases guiding my behavior (Hanson, 2000; Torbert, 2004).

The self as an instrument proved to be especially beneficial in the management of the emotional reactions that emerged as I gathered and assessed the data. Anxiety surfaced on a number of occasions, indicating opportunities to clarify roles, which varied between the two projects, and manage conflicts that emerged in each Large Scale Meeting (LSM) specific to my dual roles (Coghlan & Brannick, 2001). Anxiety also indicated areas where I should revise my approach (M. Schwartz & C. Schwartz, 1955) or look to other data sources for answers (Strauss & Corbin, 1990). Having a way to positively channel and use my anxiety, as well as disappointments and surprises, helped me regain a sense of objectivity and revisit the data with a new perspective (Chenail,

2009). This helped in balancing the conflicting needs to maintain a connection to the larger group of participants and keep a sense of objectivity at the same time (Smith, 1995).

The insights gained through the action research process were greatly enhanced by the data acquired through formal methods (Johnson & Turner, 2003). Empirical data collection provided the primary means to analyze how effective the large-scale principles were in both transmitting the organizational vision and values to the internal stakeholders, and in having the stakeholders add their own perspectives in ways that resulted in their joining with and owning the vision and values. Data were collected through three surveys designed specifically for each of the Large Group Meetings (LSM) (Converse & Presser, 1986). A sample of each survey can be found in Appendices A1-A3. These surveys included a post-survey for the first LSM, followed by a pre- and post-survey for the second LSM. All of the assessments were comprised of scaled and open-ended questions, and consistency in both the wording of the questions and in the overall format was incorporated across surveys wherever possible (Fowler, 1995).

There was some overlap in the planning and implementation timeframes of the two initiatives selected for this research project. The planning for the staff in-service began prior to the planning for the ACAP logo design meeting, but the plans were not implemented until after the ACAP meeting had taken place. It was therefore necessary to move back and forth through different stages of the process as new information emerged (Argyris, 1993; Lewin, 1946, 1947). As a result of the insight and experience gained through the first Large Scale Meeting (LSM) process and resulting data, changes were

made to the initial staff in-service meeting design at multiple stages as the approach was

redefined (Small, 1995).

Background: Adult Autism Community Program (ACAP) Communication Initiative

        The Adult Community Autism Program (ACAP) is one of two service delivery

systems administered by the Pennsylvania Bureau of Autism Services (BAS),

Department of Public Welfare (DPW) (Bureau of Autism Services

website, www.autisminpa.org). The program was designed to provide services that help

adults with autism gain independence, improve their quality of life, and become

contributing members of their communities. In January 2009 ACAP was approved on the

federal level to serve adults with autism in three Commonwealth counties and began

taking requests for applications in April of that year. In October 2009 ACAP expanded its

service delivery area to a fourth county.

        The structure of ACAP was unlike any other existing service delivery system in

the Commonwealth that was available to the population the program was designed to

support. The development of an innovative program designed specifically to meet the

needs of adults with autism was exciting. On the other hand, the negative consequence

was that it was unfamiliar to the autism community. Despite targeted efforts to get

information about this new program to families and individuals within the four ACAP

counties, the number of requests for applications and actual enrollments were much lower

than projected during the planning phases. This was a surprise in context of the long

waiting lists for other Pennsylvania service delivery programs and the findings of the PA

Autism Census Report (Bureau of Autism Services, 2009), which indicates there is a growing need for autism-specific services throughout the Commonwealth.

In the fall of 2009 the Bureau conducted a communication initiative consisting of focus groups, community meetings, and interviews to gain an understanding of the situation. The hope was to uncover some of the primary reasons ACAP was encountering such unexpected low enrollment numbers. One key finding revealed that some of the language and images being used in program brochures and other marketing materials sent an unintended message. For example, marketing materials used impersonal language like *consumers* to describe the people receiving ACAP services. Additionally, the program is designed to help men and women with autism increase their independence and quality of life, yet the materials were targeted toward the family members rather than the adults with autism themselves. Feedback indicated that potential program participants received the message that if they enrolled in ACAP they would become a nameless number in the governmental system. Furthermore, they did not want a government agency or their families making decisions for them. They viewed enrollment in ACAP as a loss of their independence and as a result they were deterred from enrolling in a program designed to do exactly the opposite.

By the spring of 2010 the feedback had been incorporated into revised written materials, website content, and outreach presentations. Designing a visual representation of the program to include in revised marketing materials became the next step in the communication strategy. In order to avoid some of the same unintended consequences that had been encountered before, it was agreed that program participants and other stakeholders representing key perspectives would be included in the process. It was also

agreed that the purpose of bringing a large group together would be to identify the criteria, based on shared values, that would then be used to design an actual logo. Large-scale interventions (Aronson & Steil, 2010; Bunker & Alban, 1997) provided a means of doing so.

Research Implementation

Scope: Internal BAS ACAP staff, external ACAP provider staff, program participants

Large Scale Meeting (LSM) Purpose: Identification of the criteria that will be used in the development of communication and marketing materials, including a logo

Planning for this particular initiative began in July 2010 and the Large Scale Meeting (LSM) was held on August 24, 2010. The development and implementation of the ACAP communication strategy and resulting initiatives fell within my responsibilities and occurred during the timeframe of this research project. My role in the creation of the ACAP logo, as implemented, was to design and facilitate the LSM from the practitioner's role, and also collect data about the efficacy of the approach as a researcher. The Large Group Design (LGD) principles and planning tools (See Appendix A) served as a guide throughout the process (Aronson & Steil, 2010).

Working collaboratively with a steering committee comprised of four internal ACAP stakeholders with differing perspectives[11] (Bunker & Aldan, 1997), the planning team was fortunate to also have the expertise of a graphic designer[12] volunteering his expertise and services. The first step was to map out the systemic considerations to share with the external designer (See Appendix B3). With the input of the steering committee

at different stages, the graphic designer and I developed the meeting components and meeting materials (see Appendices B4-B5) and then co-facilitated the LSM agenda and two follow-up meetings. The dual roles, feelings and perceptions of this project in terms of the actual development of the logo as well as the research approach were openly discussed with the steering committee and the design consultant and documented throughout the process (Flood, 2010; Heron & Reason, 1997).

The steering committee identified the participants for the larger meeting, including key individuals with the authority to influence the implementation of the final design (Feldman & Spratt, 1999). Sixteen people representing an expanded range of perspectives[13] attended the Large Scale Meeting (LSM) (Aronson & Steil, 2010). Seven of those individuals, including the four members of the steering committee, participated in two follow-up meetings to develop a visual based on the criteria, or shared values, identified, then gauge whether the designs created incorporated those values. The final logo was developed with their input over the course of five months[14] and was presented to the initial participants of the Large Scale Meeting (LSM) in February 2011 (See Appendix B6).

Conducting research in my own organization proved to have an advantage by helping to determine the most effective way to collect data during this stage of the research project (P.A. Adler & P. Adler, 1987). Due to the timing of the ACAP logo design meeting and the subculture of the program team involved (Martin, 2004), it was not possible to conduct a pre-survey or ask for 100% participation in either the meeting or in the completion of a post-assessment. The design of a logo was considered a beneficial effort, but not a priority that would warrant a lot of time being allocated to the

project in lieu of other priorities. A post-survey was instead designed for a sample population of the larger group to gauge the efficacy of the approach in meeting the specific purpose of the day (Alderfer, 1980; Aronson & Steil, 2010) as well as in transmitting organizational values and vision (Cheney, 1983; Williams, 1979). To ensure diversity in the feedback despite the small number of respondents (Jick, 1979), the post-survey was conducted with eight of the 16 participants, each of whom was chosen because they represented a different stakeholder perspective.

The first two assessments were designed as surveys and conducted as phone interviews with staff members who had been involved in the steering committee. Confidentiality and an explanation of how the results would be used were discussed prior to each interview (Fowler, 1995). The purpose for conducting the first two surveys as interviews was primarily to identify areas of confusion in the questions and the flow so that they could be adjusted before the larger sample of participants completed the assessment independently (Chenail, 2009; Converse & Presser, 1986; Fowler, 1995).

A secondary benefit to conducting the first two surveys as interviews with members of the steering committee was that it was possible to ask additional questions about their experience during the LSM planning process (Bunker & Alban, 1997). Since this intervention would be followed by a larger and more detailed LSM involving some of the same participants, the perspective gained helped inform the design and implementation of the staff in-service stage of the research process (Coghlan & Brannick, 2001; Creswell & Clark, 2011; Small, 1995).

There was not enough time during this stage of the project to conduct additional interviews so a survey format was used to gain feedback from a larger range of

perspectives over the course of the next week (Levinson, 1972). The questions and overall flow of the data collection instrument were adjusted based on the interview feedback (Chenail, 2009), and a revised survey with written instructions and an assurance of confidentiality (Harrison, 1994) was developed for the larger sampling of meeting participants. A word document version of the survey was sent out electronically to six additional ACAP LSM participants via email within two weeks of the meeting. Each person agreed in advance to complete the survey (Coghlan & Brannick, 2001), and all but one of the surveys were returned.

Because the survey sampling was so small and the individual respondents returned the surveys by email, a method to maintain confidentiality had to be designed carefully (Harrison, 1994). Surveys were not reviewed as they were submitted. Instead, they were stored electronically with a number as the name of the file, and these files were then re-ordered and re-numbered by a staff member who had not participated in any stage of the meeting and had no access to the original emails. Only at this point were the results from the post-survey reviewed and compiled into a database.

Participant observation (Bogdan, 1973; Chenail, 1992) and the use of self as an instrument (McCormick & White, 2000) served as the primary data sources for this stage of the action research process. The empirical data from the surveys was therefore used to explain the observations, feelings and images that emerged throughout the first LSM process. The empirical data from this meeting was also reviewed with the data collected through the second LSM in an effort to identify points of convergence and themes across the two interventions (Lawrence-Lightfoot & Davis, 1997).

Background: Bureau of Autism Services Staff Orientation Program

As a statewide organization, the Bureau of Autism Services staff is spread out across three regional offices in Pittsburgh, Harrisburg, and Philadelphia. Some staff members in the eastern part of the state work primarily from home or in the field. It has been the Bureau's practice to bring everyone together at least once a year around the holidays for a day of work-related discussion followed by an informal social opportunity, such as a luncheon or a potluck. The size of the staff grew as the Bureau's programs moved from design to implementation stages, and in December 2009 the in-service was expanded to two days to allow time for work-related discussions and informal socialization.

The two programs the Bureau administers continued to expand and between the December 2009 in-service and by the spring of 2010 nine new staff members joined the organization and one person left. There were fewer means for people to connect informally (Senge, et al., 1999; Trist, 1983) and existing conflicts between groups with different viewpoints began to surface with more frequency (Martin, 2004). Staff members expressed the hope that there would be opportunities to foster new or improved harmony amongst disconnected and often divergent subcultures of the organization (Meyerson & Martin, 1987). It was therefore decided to bring everyone together earlier in the year to incorporate new staff members into the larger group, and work to develop some organizational cohesion around the Bureau's mission and values (Martin, 2004).

Much consideration was put into how the time together would be spent to ensure it met the organizational needs on multiple levels (Argyris, 1993; Emery & Trist, 1960). There was interest in helping people connect to each other and to the organization (Flood,

2010; Gee, 2011; Hicks, 1996), and also in developing a shared vision of where the organization was headed (Morgan, 2006; Senge, 1990; Weisbord, 2004). It was decided to identify areas related to the organization's mission, values and current initiatives that the entire staff could engage in dialogue around (Argyris & Schon, 1996; Herriot & Pemberton, 1995; Senge, 1990). Developing a new staff orientation program as a way to transmit organizational knowledge was identified as a task that met the criteria and could be accomplished as one component of an orientation in-service for current organizational members.

Developing a staff orientation program was selected for a number of reasons. To begin with, this project was a real issue that had the support of staff members across the organization (Bunker & Alban, 1997; Cunningham, 1993). There was no policy or training procedure about what new staff was required to complete when they joined the organization, and the only orientation materials that existed were documents in an out-of-date binder that had been put together during the second year of the Bureau's existence. The regional office binders had not been updated despite many changes to the larger system, the Bureau's two adult programs, and the organization's other initiatives. As a result, there was no consistency in what new staff was provided during the entry period into the Bureau. General agreement existed that development of a staff orientation process was needed in order to meet the needs of anticipated changes to organizational membership.

An orientation program for new staff would need to meet several objectives. It should facilitate the transition of new employees into the Bureau, through tools and resources that would enable the employee to become a productive, contributing member

of the organization. It should also effectively create an understanding of the organization's interconnected components as well as the larger system and community, or external environment, in which it exists (Emery & Trist, 1960). Consideration of different organizational, autism-specific, and job-specific components would need to be incorporated into the design to help ensure the resulting program would be as effective in meeting the objectives as possible.

Working together to identify the specific criteria for a new staff orientation program provided an opportunity to develop shared context and common ground through engagement around the organization's history, current mission and vision (Aronson & Stein, 2010; Bunker & Alban, 1997; Lachs & Hester, 2004; Senge, 1990; Weisbord, 2004). The leadership and founding members would be able to share the underpinning values, beliefs and environmental factors that shaped the Bureau's design (Argyris, 1993; Heracleous, 2001; Schein, 2004). Newer staff could share their experience of entering the system and contribute ideas to ensure new staff would have an easier time becoming contributing members of the organization (Argyris, 1991; Argyris & Schon, 1996). Everyone could engage in dialogue around the larger environment the Bureau operates in as well as their vision of the organization's future (Lachs & Hester, 2004; Weisbord, 2004).

In other words, this project was a work-related initiative that everyone would be able to contribute to with an equal level of authority and expertise, regardless of their place on the organizational chart or their length of time as a staff member (Aronson & Steil, 2010). Not only would this be beneficial to new staff entering the organization over time, but it would help current members gain a better understanding of the organization

as well as co-construct a shared sense of culture and identification with the Bureau

(Cheney, 1983; Martin, 2004; Schein, 1989). Large-scale interventions (Aronson & Steil,

2010; Bunker & Alban, 1997) provided a means to create an opportunity to help the

Bureau achieve its purpose.

Research Implementation

Scope: Mandatory Bureau-wide Initiative for the 37 internal stakeholders

Large Scale Meeting (LSM) Purpose: To link the past, present and future of BAS to

identifying criteria for effective staff orientation

Initial planning for the two-day staff in-service began in April 2010 during a

three-day large-scale design workshop (Aronson & Steil, 2010), with a target date for an

August meeting. Conflicts with schedules made it necessary to postpone the meeting until

September, so planning continued throughout the summer. The Large Scale Meeting

(LSM) was held on September 21-22, 2010. Similar to the ACAP logo LSM, the

development and implementation of the in-service and resulting new staff orientation

program fell within my everyday responsibilities.

For this LSM, however, it was possible to contract with an external practitioner[15]

who had experience with large-scale design principles, governmental organizations, and

the research methodologies selected for this process. The boundaries and expectations of

my dual roles in terms of how they balanced with those of the external consultant, my

work responsibilities, and the requirements as a researcher needed to be clear (Wade,

1984). Initial agreement about these considerations were negotiated with the Bureau's

executive leadership and the consultant during the contract development and revisited periodically throughout the research process.

The primary role of the external practitioner was to consult on the design approach of the full two-day agenda and facilitate the first of the two in-service dates. My role, as implemented during this stage of the action research process, varied. My primary role throughout the planning stage of the process was to act as an internal consultant for the full two-day agenda. The external consultant facilitated the first day of the in-service, which enabled me to change roles and participate in the meeting as a stakeholder and action researcher. On the second day of the in-service, I switched back to the role of an internal practitioner and facilitated the flow of the day.

Plans to involve a steering committee comprised of a cross-sector of Bureau stakeholders had been built into the initial design of the process (Bunker & Aldan, 1997). Due to the timeframe of the contract negotiations and final approval for the support of an external consultant, however, this component of the meeting was not incorporated into the actual implementation of the planning process. The meeting agenda and materials were therefore developed based on a revised set of my initial plans with the input of the Bureau's leadership and the external consultant at different stages (See Appendix C).

Because the first day of the in-service was facilitated by someone else, it was possible for me to closely evaluate the effectiveness of the communication strategy through observations as a means of testing the hypothesis. Whereas during the ACAP logo LSM participant observation (Bogdan, 1973; Chenail, 1992) and the use of self as an instrument (McCormick & White, 2000) served as primary data sources supplemented by the empirical data, however, the reverse was true during the second LSM.

In this situation my role was to participate in a meeting I had designed as part of my professional responsibilities, and which in other circumstances I would most likely have been facilitating. Additionally, I had a vested interest in the meeting outcomes as both an organizational stakeholder and as an action researcher. With the existence of multiple conflicting interests and much riding on the successful implementation of the meeting, my personal biases and assumptions about the situation would likely affect the objectivity of my observations (Chenail, 2009; M. Schwartz & C. Schwartz, 1955; Torbert, 2004). Therefore, the observations, feelings and images that emerged throughout the process were documented and later used to explain the primary sources of data, which were collected through empirical means (Lawrence-Lightfoot & Davis, 1997; McCormick & White, 2000; Morgan, 2006).

The empirical data collected for the second LSM provided the most systematic method to evaluate the research approach, explain observations, and also gauge the effectiveness of the LSM intervention (Atkinson, Heath & Chenail, 1991; Creswell & Clark, 2011). Two surveys were developed to measure the efficacy of the approach in meeting the specific purpose of the in-service (Alderfer, 1980; Aronson & Steil, 2010) as well as in transmitting organizational values and vision (Cheney, 1983; Williams, 1979). The instruments were developed based on the ACAP LSM survey once it had been adjusted to account for areas of confusion revealed during that process (Chenail, 2009; Converse & Presser, 1986; Fowler, 1995).

CHAPTER 7

EMPIRICAL DATA SUMMARY AND ANALYSIS LSM I

A sample of the post-survey, as well as a list of the data sets, corresponding graphs, and responses to open-ended questions referenced in this chapter, can be found in Appendix B.

Empirical Data Analysis Methodology: ACAP Logo Design Large Scale Meeting (LSM)

Not all questions included in the survey administered after the Adult Community Autism Program (ACAP) logo design Large Scale Meeting (LSM) pertained to the hypothesis outlined for this research project. A data summary of all questions has been provided in Appendix B2, but a detailed analysis has been provided only for questions relating to the effectiveness of large-scale interventions in the transmission and enculturation of organizational values and vision.

During the data analysis, it was determined that the rating scales for the ACAP Logo post-survey were not all identical, and the rating categories were not clearly defined. Specifically, the effectiveness scale was supposed to gauge the meeting on a five-point scale, with 1 being the least effective and 5 being the most effective. These types of scales are widely used and consistently interpreted in the same way, so it is a safe assumption that the respondents understood the intent, and therefore the data is valid. The survey from the ACAP Logo LSM served as a litmus test for the second LSM, and scales were adjusted for use with the Staff In-Service LSM empirical data tools.

During the implementation of the survey, one of the scaled questions in the second section revealed itself to be unclear to the individuals completing the survey.

Question 3 of that section asked people to rate the understanding all other stakeholders had of the personal values held by them prior to the meeting, and 71% of responses indicated they were unsure of the understanding. The data received from the question were therefore invalid, and are included in the summary but were not used as part of the data analysis.

ACAP Logo Design LSM Empirical Data Summary Section I

The summary in this section presents the findings from the scaled questions on the post-survey that gauge the effectiveness of the Large Scale Meeting (LSM) in meeting its objectives. The corresponding data summary can be found in Appendix B2.

Table 1. Overall Effectiveness of Large Scale Meeting (LSM)
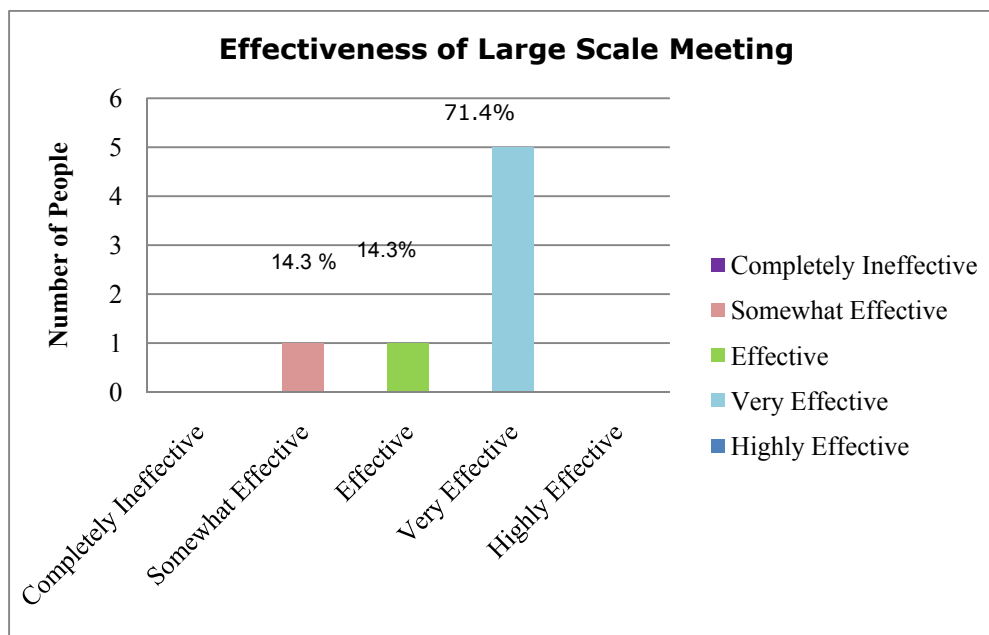
85.7% of participants rated the LSM as effective to very effective in achieving its purpose to identify the criteria to be used in the design of an ACAP logo, with implications for additional marketing strategies. 28.6% rated the LSM as somewhat effective to effective in achieving its purpose. The majority of the responses identified the meeting as very effective, indicating that in general the meeting was effective in achieving its objectives.

Table 2. Effectiveness of LSM in Identifying Values

Effectiveness of Large Scale Meeting Identifying Values

The criteria identified were the values that ACAP was built upon.

- Strongly Disagree
- Disagree
- Unsure
- Agree
- Strongly Agree
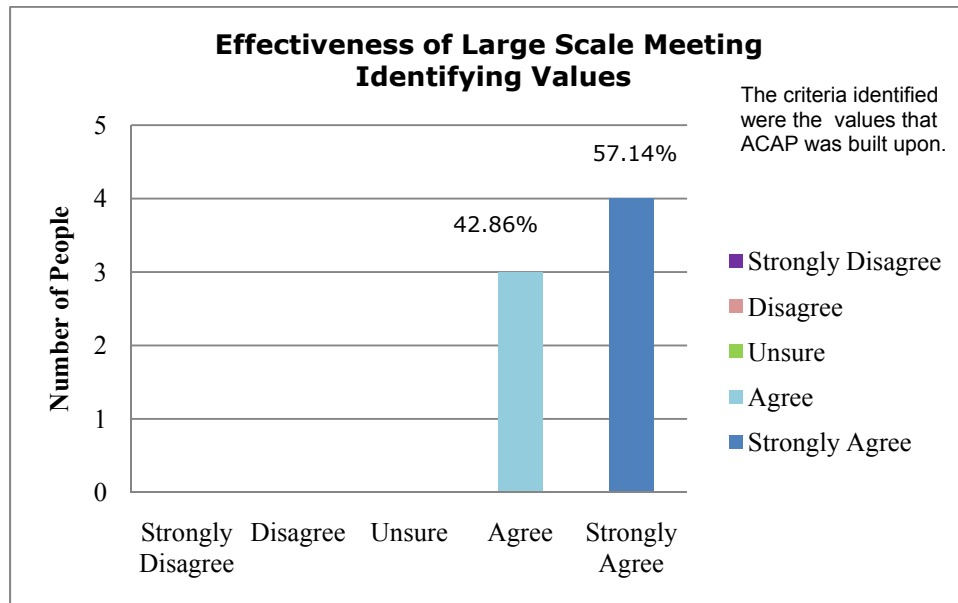
100% of participants either agreed or strongly agreed that the LSM was effective in identifying the values that ACAP was built upon. The majority of responses were in the rating category of strongly agree, and no one either disagreed or was unsure of its effectiveness, indicating that the meeting achieved this objective.

Table 3. Effectiveness of LSM in Reaching a Shared Understanding of Values
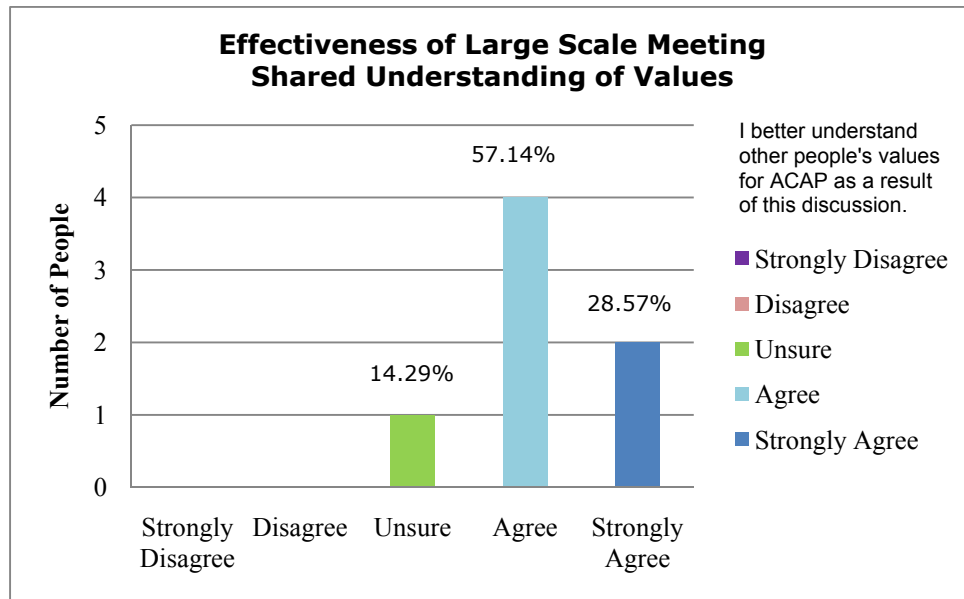
85.71% of participants either agreed or strongly agreed that the LSM was

effective in developing a shared understanding of the values ACAP was built upon. The

majority of responses were in the rating category of agree, and no one disagreed with the

statement, indicating that in general the meeting was effective in achieving this objective.

One person was unsure whether there was a better understanding of other people's values

as a result of the meeting, however, indicating the meeting could have been more

effective in achieving this objective.

Table 4. Effectiveness of Criteria in Communicating Values to Others
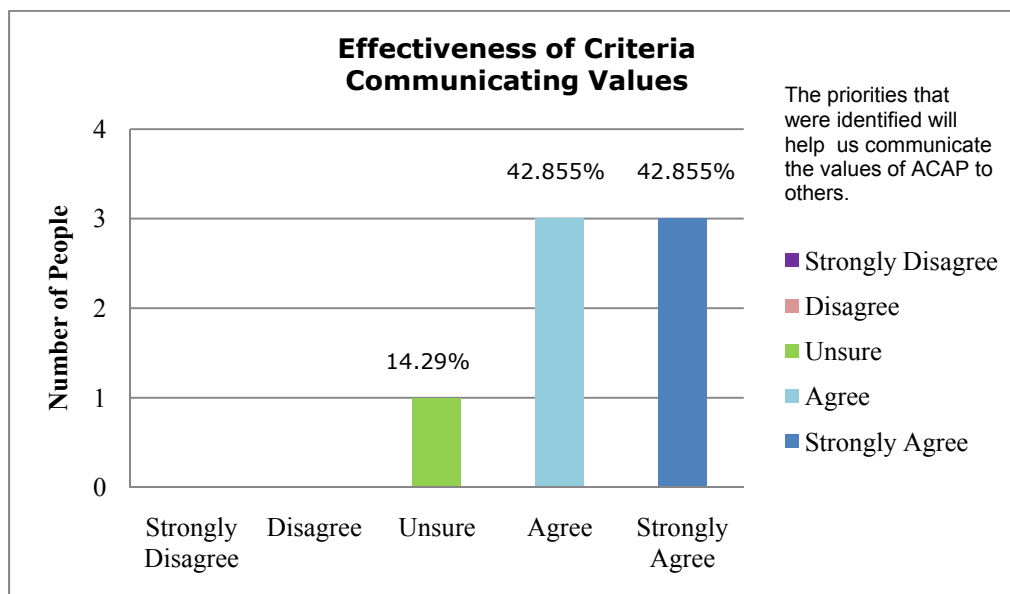
85.71% of participants either agreed or strongly agreed that the LSM was effective in identifying criteria that could be used to communicate the ACAP values to others. An equal number of responses were in the top two rating categories, and no one disagreed with the statement, indicating that in general the meeting was effective in achieving this objective. One person was unsure whether the criteria would help in communicating the values to others, indicating the meeting could have been more effective in achieving this objective.

ACAP Logo Design LSM Empirical Data Summary Section II

The summary in this section presents key findings from the open-ended questions on the post-survey that gauge the meeting's effectiveness resulting from the application of Large Group Design (LGD) principles (See Appendix A1). A number of the responses could be categorized into more than one principle but each example is only used once. The corresponding summary of the open-ended responses can be found in Appendix B2.

Table 5. Responses Referencing Large Group Design (LGD) Principles

LGD Principle	Responses Indicating Effectiveness of Principle as Applied in LSM
Clarity of Purpose	• logical activities built toward the ultimate goal • the purpose was communicated at the onset • we went through the agenda, checked where we got to • we accomplished what we wanted to • people skipped over...part of what we needed to do...but the end result was reached
Active Engagement	• open discussion • interactive • everyone participated • required everyone to participate, made it feel fun and safe to do so • saw people talking to each other and listening to each other
Whole System in the Room	• representation of all stakeholders present • nice to have the perspective of participants • effective in large part due to bringing in various perspectives & experiences • program participants were influential in the outcome • more ACAP participants, or family members in particular, would enrich discussion • the active involvement of current ACAP participants with staff will prove positive as their viewpoints obviously differ from mine and may attract others living with an ASD to the program
Shared Context	• meeting the participants gave the program meaning; I have programmatic experience but not the same family or work experience as others • people were actually listening to each other • helped make a more tangible connection between the work we do and how it affects the participants • challenged me to think about how we're marketing to the larger autism community
Self-Management in Groups	• good facilitating moved the process along • small group work was helpful • people skipped over the last part of what we needed to do...was a little worried we might have skipped something valuable but the end result was reached

LGD Principle	Responses Indicating Effectiveness of Principle as Applied in LSM
Common Ground	• collaboration of ideas • criteria will give everyone something to relate to • atmosphere fostered and encourages expression of ideas and thoughts • this meeting shows that ACAP is only effective is everyone comes together as a team and works toward the common goal • a lot of people put the sticker on the same value...surprised me that everyone was thinking the same way; they're doing good work and I'm glad that everyone has that same understanding of it
Focus on the Future	• there is a need for an image or slogan to use across time, embedded in the public conscious • this will influence the kinds of imagery and words I'll use when planning with participants • we captured key concepts and ideas that will be translated to help insulate these into future efforts • can be applied to reach a younger generation • there is a lot of work ahead of us, but it can be done, one step at a time • give ACAP an identity and increase enrollment • allow ACAP to stand out from other programs • help the program become more recognizable • increased referrals and overall growth of the program • lead to increased interest among potential providers which would in turn offer more choices to the participants • hopefully with increased awareness people won't have to worry so much about what's going to happen to them
Equal Standing	• participant shared his story • everyone's input was valued • Program participant's comments made me realize we were coming up with an image of the program - she was coming up with an image about herself. • more didn't come up because we were afraid to cross [executive staff] b • program participant was strong, articulate and stood up to the group • people felt comfortable sharing and their ideas were respected

A summary of the criteria, or values, identified in the meeting, along with statements made during the meeting that are relevant to the hypothesis, can be found in Appendix B6.

ACAP Logo Design LSM Data Analysis

The empirical data, comments and quotes referenced in this section can be found in Appendix B. The Large Group Design (LGD) principles referenced can be found in Appendix A1.

According to the survey data, approximately 90% of the Large Scale Meeting (LSM) participants gauged the meeting to be effective in reaching its purpose, creating a shared understanding of values, and creating a means to communicate those values to the larger autism community. As explained in Chapter 6, only seven of the 16 attendees completed the survey, but the people who completed the survey represented a cross-sector sampling of the ACAP stakeholder perspectives, and triangulating the data with observations and field notes contributed to the validity of the findings. When the multiple sources of data are considered together, the indication is that the Large Group Design (LGD) principles were effectively applied to the meeting design, and as a result the Large Scale Meeting (LSM) was effective in transmitting values and creating a shared vision of the program's future.

The combined data provide evidence that having the right people in the room to work on a clear purpose was the most influencing factor in how people gauged the effectiveness of the LSM. For example, 85.71% of respondents indicated the meeting was effective in achieving its purpose and others noted "we accomplished what we wanted

to." Additionally, all seven surveys mentioned the diverse stakeholder representation, and two people indicated the meeting would have been even more effective with additional perspectives.

Informal observations further indicate it was the combination of these principles that impacted people's evaluation of the LSM effectiveness. For instance, one of the stakeholders in attendance was a program participant working toward the goal of becoming a recognized artist. After the group introductions, this attendee came up to me and said, "When I heard you already had a professional designer I didn't know why I was coming to this meeting. I thought maybe you invited me just for kicks and giggles. But now I know why I'm here and I have a lot to say." This indicates that without a clear purpose, having the right people in the room may still have been effective, but not as effective.

The data provides evidence that the LGD principles of active engagement and creating equal standing were also influencing factors in how people rated the effectiveness of the meeting. For example, the interactions observed during exchanges of dialogue were different from what I had observed when some of the same people were in other settings. Typically, the same people did most of the talking and they were rarely contradicted. During this meeting, however, everyone was providing input and people from different authority levels were interacting. In one particular instance, a high-level executive began to question the need to create a logo and the purpose of the meeting in general. This created conflict as others began to engage in a back-and-forth discussion and could have derailed the entire meeting.

Comments on the survey noted that an ACAP participant "stood up to the group" and reminded everyone that the purpose was about identifying criteria, not just a logo. Two participants noted the environment created made it "safe" to voice an opinion during the meeting. As a result, different perspectives were respected, and it was possible to use the exchange of divergent viewpoints to emphasize why everyone had been invited to participate before transitioning back to the agenda. This indicates that having the right people in the room and a clear purpose, without opportunities for active engagement or the development of equal standing, may have been effective, but not as effective.

The application of the self-management principle within the small groups was easier to design than to facilitate, and potentially impacted the validity of the data about the meeting's effectiveness. This observation was explained by multiple sources of data. The first indication that this principle was important to pay attention to, yet would be challenging to implement, was a dream, or image, that occurred during the final stages of meeting planning.

The week before the ACAP logo meeting I had a dream that was reminiscent of the ones that would recur during my teaching years, prior to the first day back to school or the night before an observation lesson. The dream was a typical anxiety dream, when all the preparatory planning for a lesson I was teaching fell apart in absurd and bizarre ways. The dream was filled with images of problematic students ignoring directions, a lack of instructional materials, and support staff whose priorities were not aligned with the day's objectives.

The dream indicated to me that while I was confident in the approach being taken, anxiety existed about how effectively the LGD would be implemented. I'd had some

experience as a participant and a designer with simulated large-scale interventions, but this was my first experience with a real one, and my first experience facilitating one altogether. Similar to the "unique" meeting experience described by one survey respondent, the design was new to me as well. There were times during the meeting when it was challenging to trust the process and the principles, but having an experienced designer co-facilitating proved to be an effective strategy in implementing this principle. He kept me busy during group work so that I did not step out of my facilitator role and jump in with ideas. He further helped me work through anxiety and channel my enthusiasm during the group work so that my feelings would not impact the group and therefore the validity of the data.

For example, one activity involved the small groups recording their ideas on chart paper to capture ideas before narrowing them down and posting the most important ones. This instruction was included on the handout for that part of the activity. However, knowing the personalities in the room, I was aware that a lot of people prefer to do things quietly or without getting up, so at the last minute notepads were placed on the tables and groups were told that they could use that as an alternative option, as long as the final concepts ended up on the wall.

I began to regret this as they were working, because the practitioner in me believed there was a lot of value in having all of the individual ideas in the group posted together so visually. I was indecisive about interrupting the groups while they were working to tell them to stick with the original instruction of using the chart paper to record their ideas. Based on my experience with the people in the room combined with years of teaching, however, it was recognized that vacillating between sets of directions

would have really annoyed a couple of the attendees, which would also impact the validity of data rating the meeting's effectiveness. The groups continued to work uninterrupted, and all but one group decided to use the chart paper to record ideas.

In other instances, some of the participants tried to draw me into the process during small group work. Surprise was expressed when I redirected them to the written instructions in the folder and re-emphasized that they should work as a group to determine how they would accomplish each of the activities during the timeframe set for that part of the meeting. As long as they achieved the overarching purpose, the groups should consider themselves on task. One person commented that this was a "big change" from the direct involvement I usually have both when facilitating and in ACAP-related communication projects. The post-survey indicated anxiety that the groups "might have missed something we had to do" by skipping an activity but also indicated "the end result was reached so I thought it was ok."

It was my observation of the final activity of the day, however, that provided strong evidence that the meeting had been effective in transmitting and creating a shared understanding of values and vision. The steering committee had decided to use the word "criteria" rather than "values" in the wording of the meeting's purpose, with the intention that I would close the meeting by talking about the criteria as a set of values. This proved to be unnecessary, however.

As the small workgroups combined their top shared criteria to the wall with those of the other groups, they began moving the words around, combining like words and engaging in dialogue about the whole group set of words that was emerging. I observed a level of excitement increasing in the room as people were talking, which matched my

own feeling of what was happening and was further supported by comments on the post-survey that the meeting was "fun."

The energy in the room increased even more when someone pointed out that the words "values" and "ACAP" were posted as criteria on the wall, and then someone else commented, "Hey, that's right...maybe we should move the word ACAP to the top like a title, like this." This was followed by an exclamation by a third person who said, "Hold on. I think that these words ARE the values that ACAP is built on. We should not only move the word ACAP to the top like [the stakeholder] said, but we should also move the word "values" to the bottom. You know, like a foundation." That same person later reported having goose bumps during this exchange which reflected my own sense of awe at the outcome. This may also explain why 100% of the people surveyed agreed or strongly agreed that the LSM was effective in identifying the values ACAP was built upon.

Further evidence that the meeting was effective in transmitting and creating a shared understanding of the ACAP values emerged as the data was triangulated. Even though I did not directly participate in this meeting, I am a founding member of the Bureau. I hold my own set of values for ACAP, as well as a very good understanding of the espoused values presented in marketing efforts as the foundation for the Bureau's adult programs. As a result, I was very interested to see how my perception of the criteria that would best inform the design of the logo compared to those identified by the larger group.

Prior to the meeting, I wrote a list of my top 10 personal values for the program, along with design considerations based on the criteria I thought were most important.

These proved to be a good guide for discussions with both the external planner and the steering committee as we determined the purpose for meeting and the outcomes we hoped would emerge at the end of the day. After the meeting, I compared this set of values to the criteria that emerged during the LSM. The results were enlightening. Six of the 10 values I had identified were reflected either on the criteria posted to the wall or in the additional words that were captured from the group dialogue, and three were in the top five priorities the group identified. This did not surprise me, but similar to a comment made by a meeting participant on the post-survey, it was gladdening to see that everyone had a shared understanding of those values.

The data showed that 85.71 % of the people surveyed indicated agreement that the LSM was effective in reaching a shared understanding of the values, and it was satisfying to see the similarities in the lists. Surprises also emerged as the sets of values were compared, however. For instance, one of the criteria on my list was directly contradicted by a program participant, who described a value that was the exact opposite. This indicates that if I had simply designed the logo on my individual assumptions about what was important, rather than identifying criteria with the input of different perspectives, an unintended or unsupported message would have been built into the design.

This finding supports the use of a large-scale intervention for this initiative, especially since feedback about unintended messages that had been built into the original marketing materials had led to the need for an image to represent ACAP in the first place. The findings about stakeholder involvement presented previously further indicate that my invalid assumptions were not the only ones that surfaced and replaced by a new way of

thinking as a result of the interactive dialogue between people with divergent

perspectives.

Comparing the lists of values provided additional evidence that the application of

the Large Group Design principles had been effective, especially in helping people

identify with the entire system and experience that they are part of the system. For

example, 38 words that represented program values that were not on my list were

identified through interactive dialogue of the different stakeholders in the room. At least

half of those words were ones that resounded with me but had never occurred to me to

use when describing the program. As one of the meeting participants noted on the survey,

the list generated was "impressive, creative, and comprehensive."

In fact, 85.71% of survey respondents indicated the LSM has been effective in

identifying criteria to communicate the ACAP values to others. Open responses to this

question indicated that people thought the criteria, or values, identified would help to

describe the program to others, including younger generations. Hopes were expressed

that a logo built on these words would increase enrollment and decrease the fear people

have about a life without support. People described ways they would use the words when

working with program participants and that a positive future could be reached through

continued teamwork.

Despite my initial anxiety, my general sense was that the meeting had gone very

well, and had been effective in achieving its purpose. This was confirmed through

multiple data sources. After the meeting the program participant was asked whether being

a part of the discussions had personally made a difference in the outcome of the meeting.

The response provided was, "Well, the things that are important to me are up on that

wall. So yes, I guess people really listened to me and thought my ideas were important. I didn't know that before." Feedback on the post-survey further noted that this person's participation was influential in changing their thinking about the program and adults with autism, and also provided a better understanding of the larger context ACAP operates in. The meeting was described as "unique," "fun," and "focused on the task."

The combined data indicates that when Large Group Design (LGD) principles are applied as an organization goes about its everyday work, the means is created for effective communication among stakeholders and leads to positive outcomes. For example, the findings support the importance of having the right people in the room matched to a meaningful and targeted purpose, and the value of enabling people to engage in dialogue during self-managed group work. There is also evidence to support planning principles recommending that the activities are significant but secondary to the LSM flow elements, and the importance of transparency in how decisions will be made about what emerges both during and after the meeting. Overall, the findings indicate that the Large Scale Meeting (LSM) was effective in transmitting values and creating a shared vision of the future, with the key to success being the application of the Large Group Design (LGD) principles throughout the planning and implementation process.

CHAPTER 8

EMPIRICAL DATA SUMMARY AND ANALYSIS LSM II

A sample of the pre- and post-surveys, corresponding data sets, and responses to open-ended questions referenced in this chapter, can be found in Appendix C.

Empirical Data Analysis Methodology: Staff In-Service Large Scale Meeting (LSM)

Not all questions included in the surveys administered before and after the staff in-service Large Scale Meeting (LSM) pertained to the hypothesis outlined for this research project. A data summary and analysis have therefore been provided only for questions directly related to the effectiveness of large-scale interventions in the transmission and enculturation of organizational values and vision. An understanding of the organizational mission has relevance to how an organization's values and vision are understood as applied to its everyday work, so the data summary and analysis include questions related to the mission as well. A summary of the open-ended responses pertaining to the hypothesis is provided after the scaled question findings.

In Chapter 6, it was noted that the scales used in the post-survey categories were adjusted to more clearly define the scales used in the pre-survey questions. The rating scales used for the pre- and post-surveys were therefore similar, but not identical. Additionally, the effectiveness scales on the post-survey were supposed to gauge the meeting on a five-point scale, with 1 being the least effective and 5 being the most effective. On the post-survey the second to highest category was "somewhat effective" which may have been misleading to respondents. Due to a shortage of time, it was not possible to test the post-survey prior to distribution, so this was not identified as an area

of potential confusion until the data was summarized. However, these types of scales are widely used and consistently interpreted in the same way, so it is a safe assumption that the respondents understood the intent, and therefore the data is valid.

The scaled post-survey questions rating the effectiveness of the staff in-service in meeting its objectives were first considered as a comprehensive set. In an effort to explain these findings, the data from each scaled pre- and post-survey question related to an understanding of the organizational values, mission and vision were also considered as a comprehensive set. The data sets were then compared to measure whether there had been any changes in an understanding of the organizational values or mission as a result of the large group intervention. The pre-survey did not include questions related to organizational vision, so it was not possible to measure the level of change in an understanding of the vision. Instead, the data summary and analysis indicate the level of understanding of the organizational vision only after the in-service.

The two post-survey questions gauging the effectiveness of the intervention in creating a shared understanding of values and vision were then cross-referenced with the pre- and post-survey data sets. All of the post-survey questions gauging the effectiveness of the meeting, and the pre-and post-survey data sets gauging an understanding of values, mission and vision, were then cross-tabulated with questions related to the length of time people had been members of the organization, then with the amount of organization-specific training they had received, and then a third time with the amount of role-specific training they had received.

The comprehensive set of results was further evaluated in an effort to identify themes across the data sets. The cross-referenced data summaries specific to the length of

employment are provided as either a table or in an appendix, while the organization-

specific and role-specific data are provided only as appendices and referenced in the

analysis where they provide insight into the other findings about the effectiveness of the

Large Scale Meeting (LSM) in achieving its objectives.

Staff In-Service LSM Data Summary Section I

The summary in this section presents the findings from the scaled questions rating

the effectiveness of the Large Scale Meeting (LSM) in achieving its objectives. The

corresponding data summaries comparing the findings from Tables 6 and 7 to how people

gauged their understanding of organizational values, mission and vision before and after

the LSM can be found in Appendices C3 and C4.

Table 6. Effectiveness of LSM in Reaching a Shared Understanding of Values
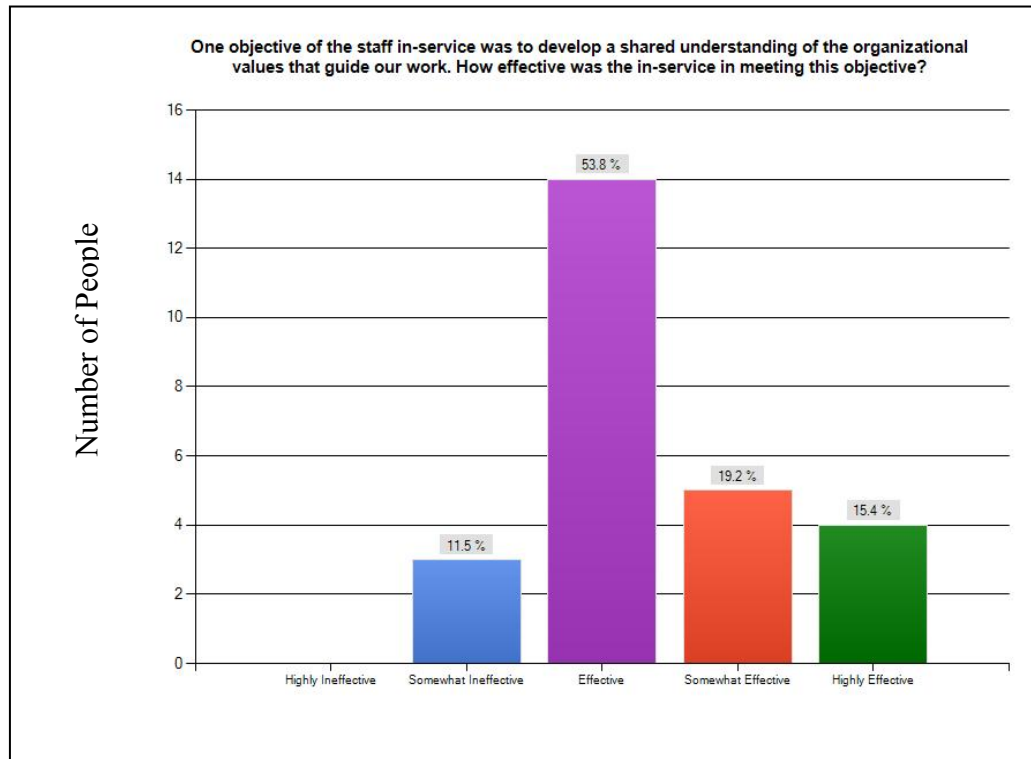
88.4% of participants rated the LSM as effective to highly effective in developing a shared understanding of the values guiding the organization's work. 65.3% rated the LSM as somewhat ineffective to effective in developing a shared understanding of the values guiding the organization's work. The majority of the responses fell into the mid-range, indicating that in general the meeting was effective but could have been more effective in achieving this objective.

Table 7. Effectiveness of LSM in Reaching a Shared Understanding of Vision
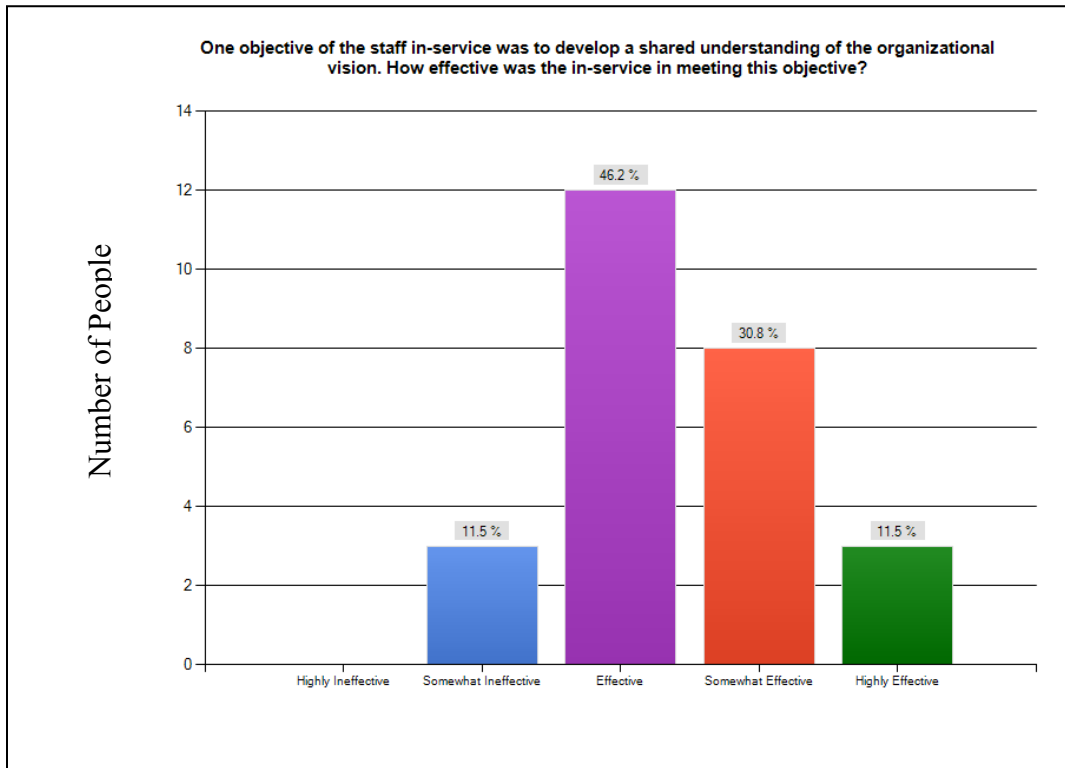
88.5% of participants rated the LSM as effective to highly effective in developing a shared understanding of the organizational vision. 57.7% rated the LSM as somewhat ineffective to effective in developing a shared understanding of the organizational vision. The majority of the responses fell into the mid-range, indicating that in general the meeting was effective but could have been more effective in achieving this objective.

Table 8. Effectiveness of LSM in Identifying Staff Orientation Criteria
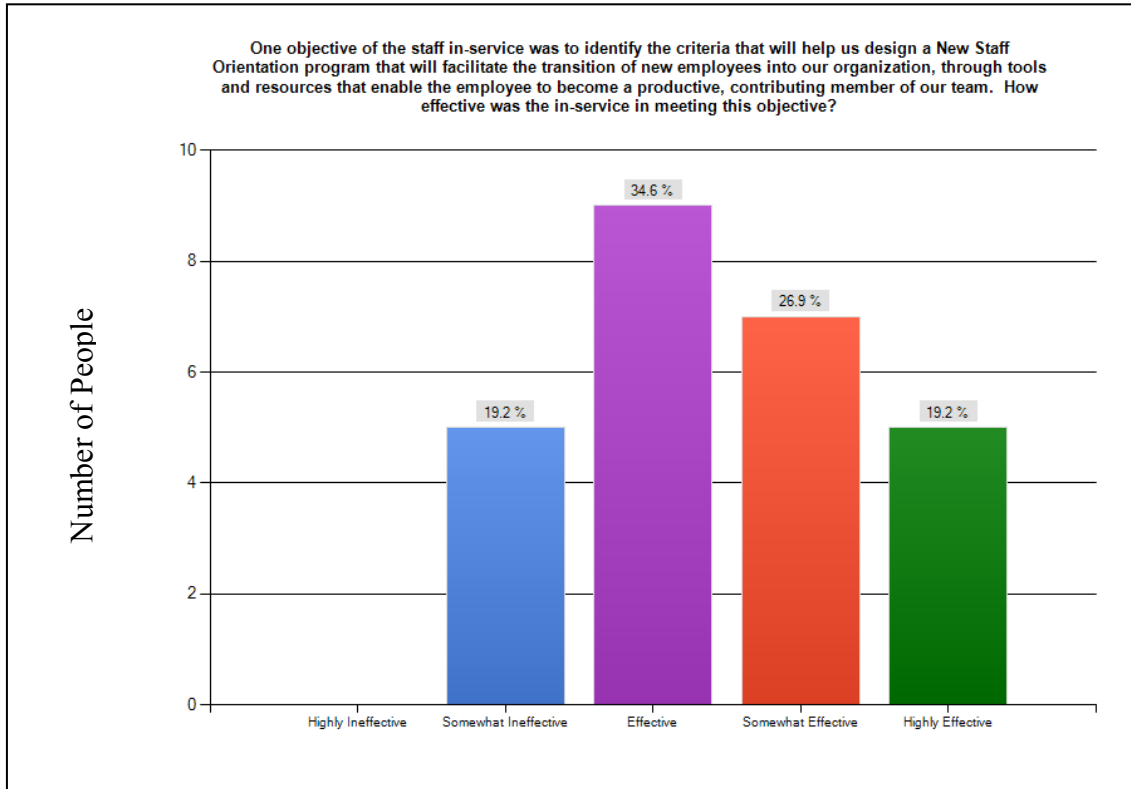
80.7% of participants rated the LSM as effective to highly effective in identifying

the criteria for a new staff orientation program. 53.8% rated the LSM as somewhat

ineffective to effective in identifying the criteria for a new staff orientation program. The

majority of the responses fell into the mid-range, indicating that in general the meeting

was effective but could have been more effective in achieving this objective.

Table 9. Effectiveness of LSM in Creating Personal Connections to the Work
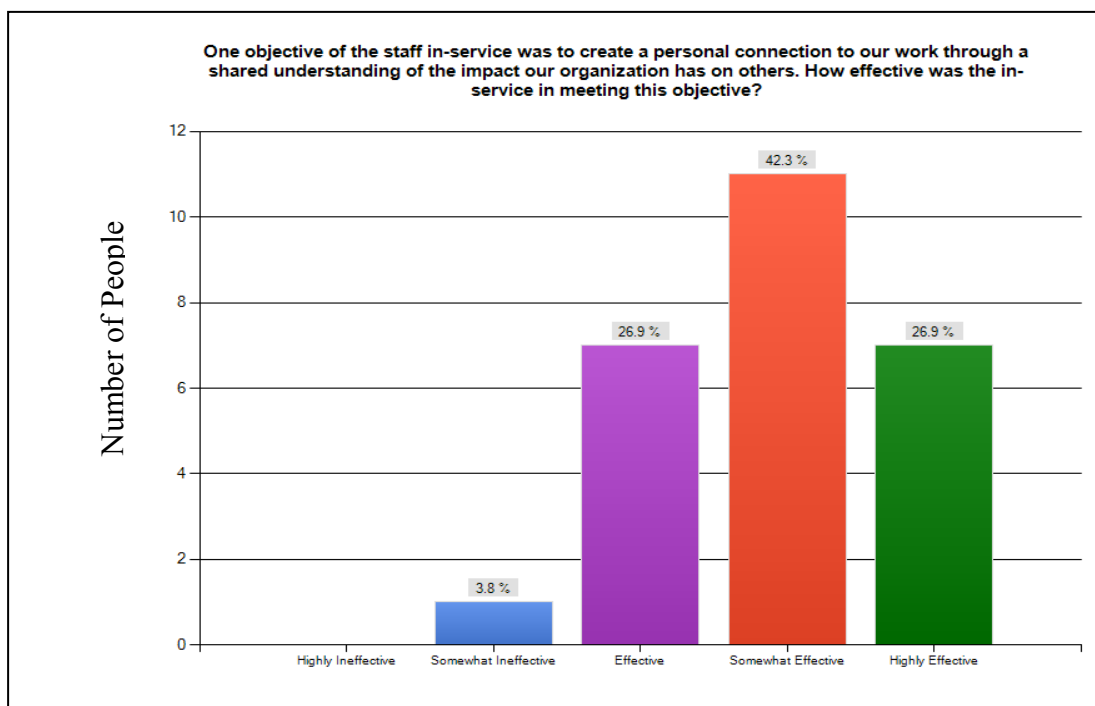
96.1% of participants rated the LSM as effective to highly effective in creating a personal connection to the organization's work. 30.7% rated the LSM as somewhat ineffective to effective in creating a personal connection to the organization's work. The majority of the responses fell into the second to highest range, indicating that the meeting achieved this objective.

Staff In-Service LSM Data Summary Section II

The summary in this section presents the findings from the scaled questions rating the effectiveness of the Large Scale Meeting (LSM) in achieving its objectives, cross-referenced to length of employment with the organization, as of the in-service date (See Timeline, Appendix D). To interpret these charts, it is important to note that each color represents a subgroup of people who have been employed with the organization for a

specific amount of time. For instance, the green subgroup represents the four people who have been employed with the organization for three to four years and completed the post-survey. Each green column shows the number of people within the "3-4 years" subgroup who rated the degree of effectiveness within a specific range (i.e. "effective" or "highly effective"). This is consistent for each subgroup, and for each of the four objectives being rated.

In between the time that responses were collected on the pre-survey to the post-survey, 50% percent of the people who were in the category of "less than six months" at the time of the pre-survey moved to the category of "6-12 months" on the post-survey. Therefore, in order to maintain the validity of the findings when comparing the pre-survey data to the post-survey data, it was necessary to combine the two subgroups into one category. This subgroup is referred to as "up to one year" or "0-1 year" in the data summary.

The corresponding data summaries comparing length of employment to how people gauged their understanding of organizational values, mission and vision before and after the LSM can be found in Appendices C5 and C6.

Table 10. Shared Understanding of Values/Length of Employment
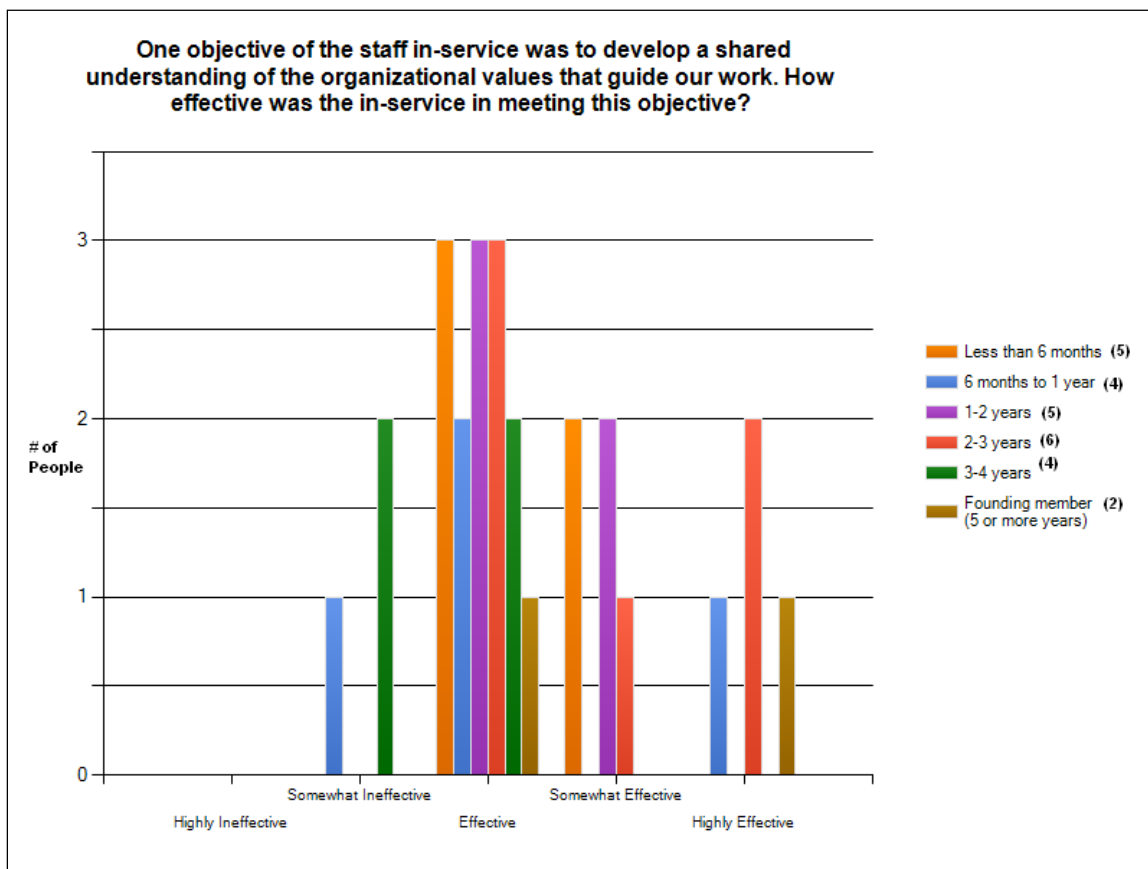
Subgroups representing all lengths of employment rated the LSM as effective to highly effective in developing a shared understanding of the values guiding the organization's work, with 100% of the "1-2 years," "2-3 years," and "founding member" subgroups in this range. Subgroups representing all lengths of employment rated the LSM as somewhat ineffective to effective, with the majority of the "up to one year" subgroup and 100% of the "3-4 years" subgroup in this range. This indicates that the meeting was most effective in creating a shared understanding of values for founding members and staff with 1-3 years of employment, and less effective in achieving this objective for new employees and staff members with 3-4 years of employment.

Table 11. Shared Understanding of Vision/Length of Employment
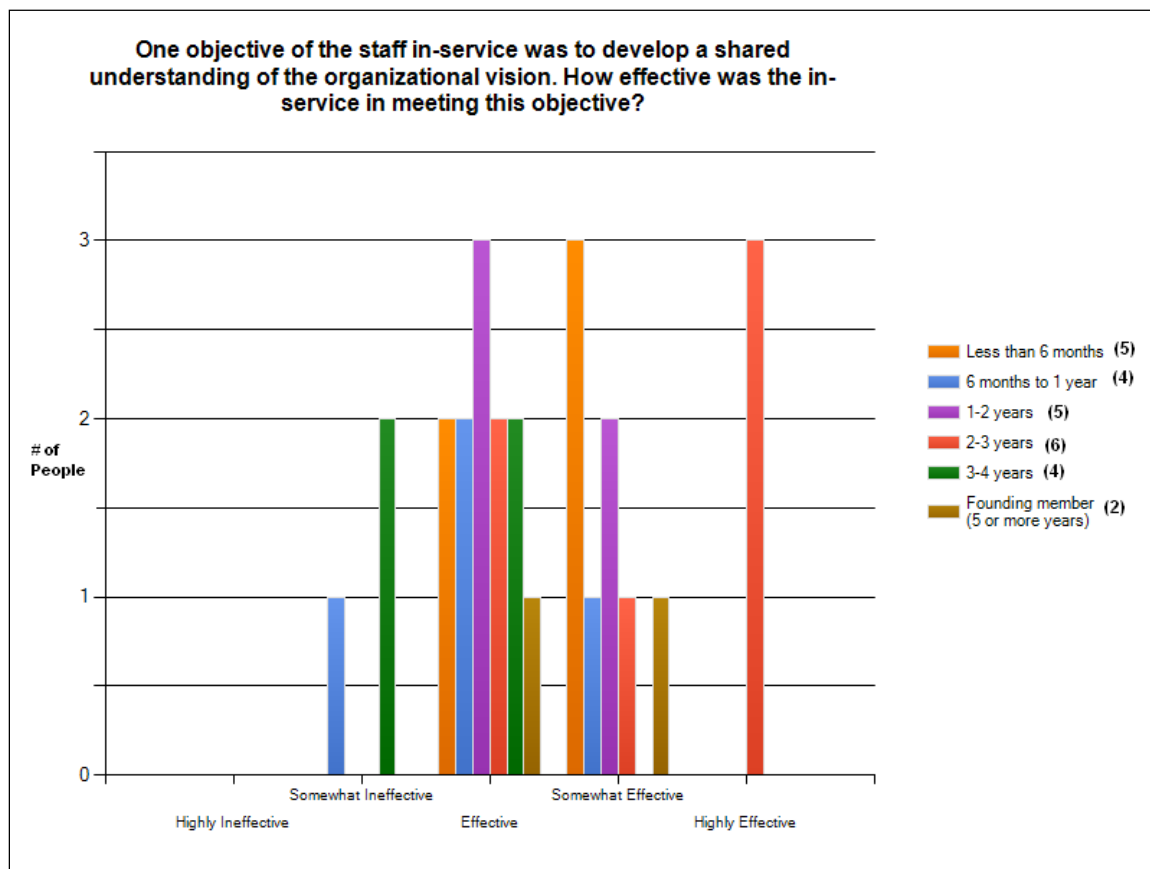
Subgroups representing all lengths of employment rated the LSM as effective to highly effective in developing a shared understanding of the organizational vision, with 100% of the "1-2 years," "2-3 years," and "founding member" subgroups in this range. Subgroups representing all lengths of employment rated the LSM as somewhat ineffective to effective, with 55% of the "up to one year" subgroup and 100% of the "3-4 years" subgroup in this range. This indicates that the meeting was most effective in creating a shared understanding of the organizational vision for founding members and staff with 1-3 years of employment, and less effective in achieving this objective for new employees and staff members with 3-4 years of employment.

Table 12. Identifying Staff Orientation Criteria/Length of Employment
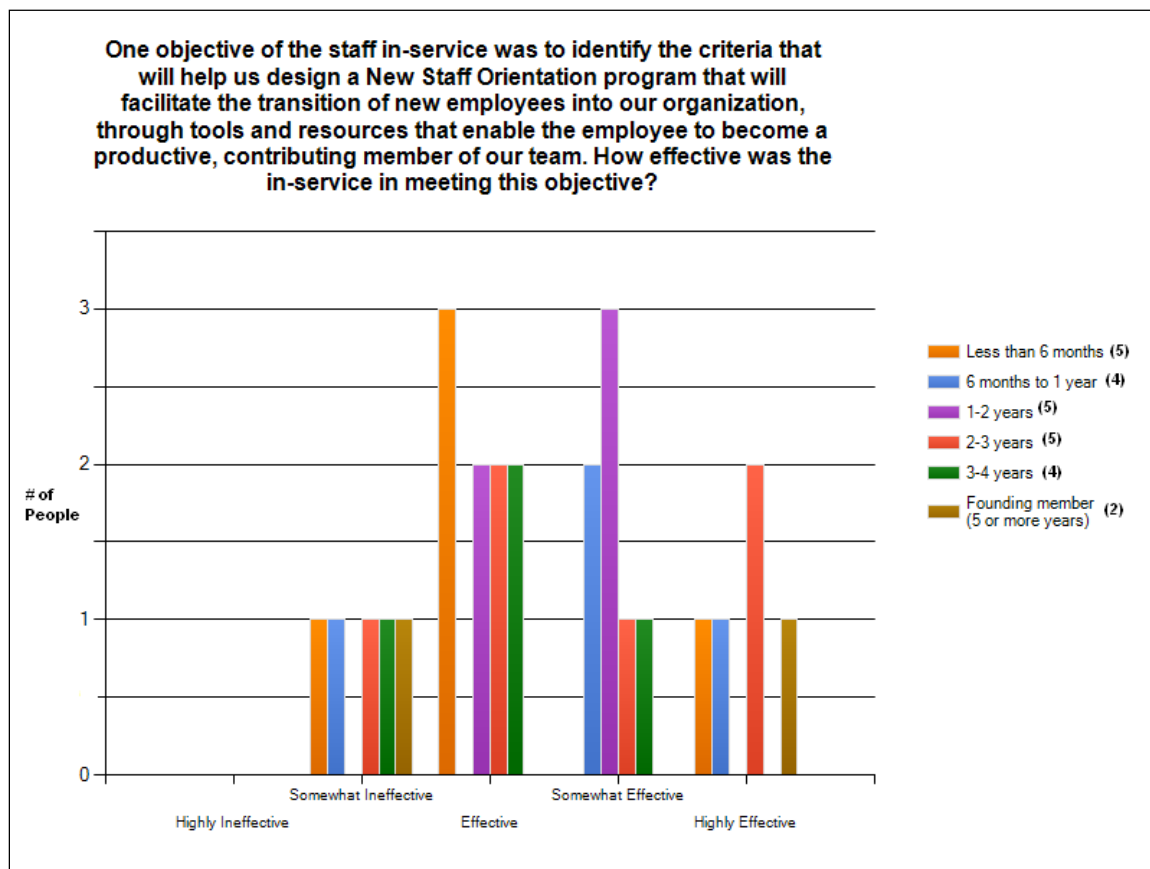
Subgroups representing all lengths of employment rated the LSM as effective to highly effective in identifying the criteria for a new staff orientation program, with 100% of the "1-2 years" subgroup in this range. Subgroups representing all lengths of employment rated the LSM as somewhat ineffective to effective, with 50% of the "2-3 years" and "founding members" subgroups and 100% of no subgroups in this range. This indicates that the meeting was most effective in identifying the criteria for a new staff orientation program for founding members and staff with 1-2 years of employment, and less effective in achieving this objective for all other subgroups.

Table 13. Creating Personal Connections to the Work/Length of Employment
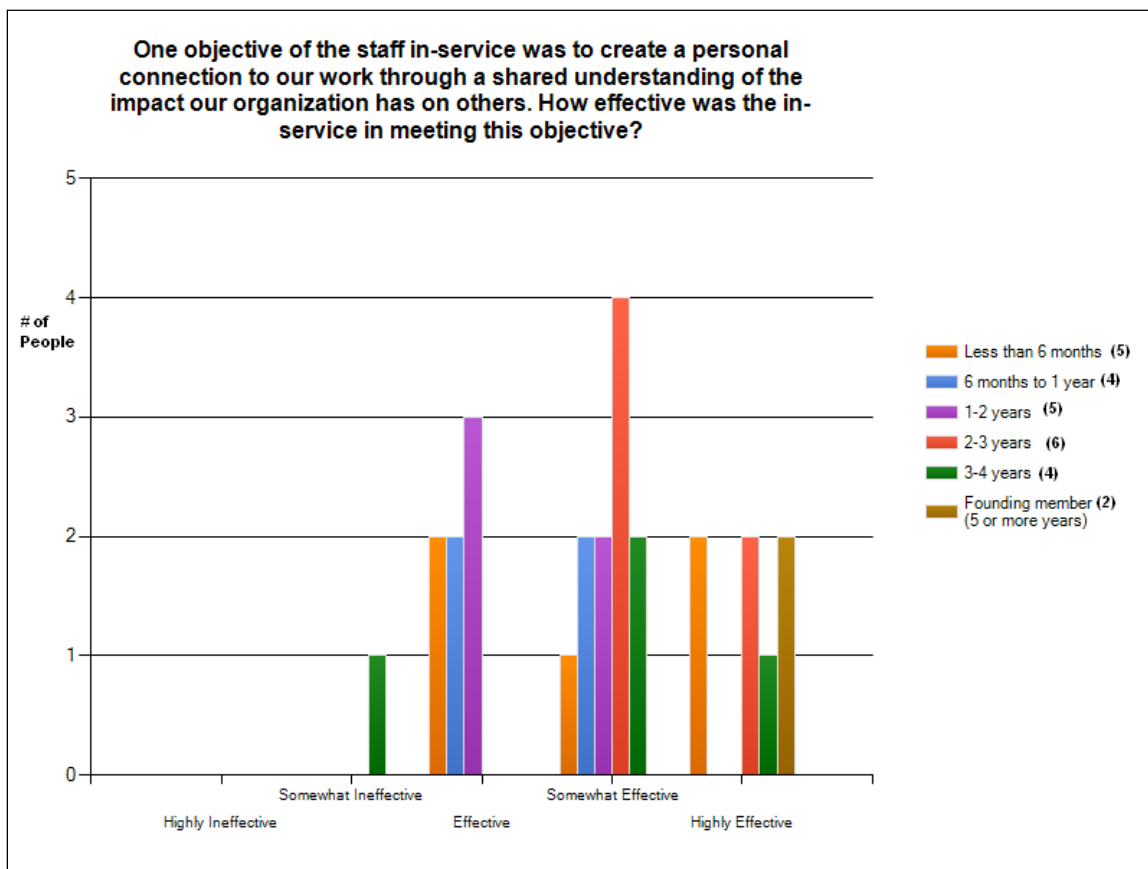
One objective of the staff in-service was to create a personal connection to our work through a shared understanding of the impact our organization has on others. How effective was the in-service in meeting this objective?

Legend:
- Less than 6 months **(5)**
- 6 months to 1 year **(4)**
- 1-2 years **(5)**
- 2-3 years **(6)**
- 3-4 years **(4)**
- Founding member **(2)** (5 or more years)

X-axis: Highly Ineffective, Somewhat Ineffective, Effective, Somewhat Effective, Highly Effective

Y-axis: # of People

Subgroups representing all lengths of employment rated the LSM as effective to highly effective in creating a personal connection to the organization's work, with 100% of the "1-2 years," "2-3 years," and "founding member" subgroups in this range. Subgroups representing all lengths of employment rated the LSM as somewhat ineffective to effective, with 50% of the "3-4 years" subgroup in this range. This indicates that the meeting was effective in creating a personal connection to the work for most subgroups, and less effective in achieving this objective for staff members with 3-4 years of employment.

Staff In-Service LSM Data Summary Section III

The summaries presenting the findings from the scaled questions rating the effectiveness of the Large Scale Meeting (LSM) in achieving its objectives, cross-referenced to organization-specific and role-specific training, can be found in Appendices C7 and C8.

Staff In-Service LSM Empirical Data Summary Section IV

The summary in this section presents key findings from the open-ended questions on the post-survey designed to gauge the meeting's effectiveness resulting from the application of Large Group Design (LGD) principles. The comprehensive summary of responses can be found in Appendix C9.

Table 14. Responses Referencing Large Group Design (LGD) Principles

LGD Principle	Responses Indicating Effectiveness of Principle as Applied in LSM
Clarity of Purpose	• asking for ideas from staff prior to the in-service and/or sharing the goals in advance might have made people more vested in the outcomes • I look forward to seeing a concrete outcome in terms of a real employee orientation, which is very much needed • needed to be more focused on the objectives of BAS and the roles of each program • the goal of coming up with an employee orientation could possibly have been accomplished more effectively with a smaller group and a survey; seemed more like an activity just to give us something to do • the "so-what" has to be clearer, with activities cross-walked to that explicitly • the group activities could have been more focused on the objectives

LGD Principle	Responses Indicating Effectiveness of Principle as Applied in LSM
Active Engagement	• good opportunity to be face-to-face with others • helpful to see everybody face-to-face and share comments, concerns • was hoping for more in-depth discussion of the history of the organization • the activity where we moved from table to table to reflect on different possibilities for the employee orientation didn't really work for me • a social networking event would have helped us connect in a less formal way
Whole System in the Room	• more in-depth understanding of staff connections, backgrounds and interests to use as resources • know reps from other offices better • easier to connect and interact with people now • the consumer speeches made me remember what my job is all about • having program participants speak to us was the most effective part of the in-service • helped me learn something fun about people I don't normally talk to • meeting together helps smooth day-to-day interactions • effective in bringing people from the three regional offices together to share face-to-face meetings • not sure everyone came away with an understanding of what each person's role is within BAS. This is a significant hindrance on a daily basis.
Shared Context	• wonderful learning the history • invigorating to discuss the ideals and values that formed BAS • my values clearly match that of BAS • wish we had taken the opportunity to describe to each other more completely our roles in the organization • needed more time allotted for the regional offices to discuss problematic issues as a group • would have liked to see a breakdown of specific roles (who does what)

LGD Principle	Responses Indicating Effectiveness of Principle as Applied in LSM
Self-Management in Groups	• usually hate "ice-breakers" but group activities were a creative and effective way in reaching the objectives • would have been more effective to have group discussion without upper management present and managing the meeting • it was clear a lot of effort was made to get us talking together
Common Ground	• made me aware of the very concerns I have that others also have; reassuring that I was not on an island by myself • there is still some division among staff • would have added time for regions to exchange information
Focus on the Future	• speech about the founding of organization encouraged me to follow the mission with more passion • meeting our participants gave me motivation at work • I've started to consider how what I'm working on every day ties to the values • there should be quarterly face-to-face meetings and more face-to-face trainings specifically related to our job • would have liked to hear, "X, Y, Z are the values we want to bear in mind while working at BAS because___" • still do not see where those charts on the wall are going • would have like to discuss training that current employees would like • would have added more information about our current issues and future • minimal to no impact on my day to day work
Equal Standing	• gained a greater appreciation for the diversity of gifts, talents, backgrounds of others • in-service did a good job of allowing everyone to share their understanding of BAS mission/vision/values • people may not say what's on their mind when the meeting is micro-managed

<u>Staff In-Service LSM Data Analysis</u>

The empirical data, comments and quotes referenced in this section can be found in Appendix C. The Large Group Design (LGD) principles referenced can be found in Appendix A1.

According to the survey data, approximately 88% of the Large Scale Meeting (LSM) participants gauged the meeting to be effective in reaching its purpose, creating a shared understanding of values and vision, and creating personal connections to the work through an understanding of the organization's impact in the larger autism community. The people who completed the pre- and post-surveys represented a majority of organizational stakeholder perspectives and attendees, and the empirical findings collected through this means were triangulated with data collected through observations and field notes. When the multiple sources of data were considered together, the indication was that the Large Group Design (LGD) principles were applied somewhat effectively to the meeting design, and as a result the Large Scale Meeting (LSM) was effective in transmitting values and creating a shared vision of the organization, but not as effective as it could have been.

The combined data indicated that the meeting was most effective in creating a personal connection to the organizational work by developing a shared understanding of the organization's impact on others. For instance, 96% of respondents rated the LSM as effective to highly effective in reaching this objective, with 100% of founding members rating it as highly effective and the majority of staff rating the effectiveness in the two highest categories. Comments on open-ended questions noted that hearing about the

difference they were making for program participants and their family members during the final flow element of the two-day meeting was "the most effective part of the in-service," "helped me remember what my job is all about," and "was very moving!" During this section of the meeting a colleague gave me a sign of approval from across the room, and my own energy level and sense of enthusiasm mirrored the relaxed smiles and nods I observed around the room.

Although not directly measured, the data indicated that the in-service was also effective in helping people make personal connections to each other. During an informal meeting break discussion, one person commented on the "camaraderie and unity" developing during the meeting and further observed this was noticeable "even at lunch...people were sitting together who normally don't." Comments on the post-survey noted that people had a "more in-depth understanding of staff connections, backgrounds and interests to use as resources."

It was instructive to hear plans being formed among people from different regional offices to start having regular calls about their shared responsibilities. This supported post-survey comments that attendees "know reps from other offices better now" and that it would be "easier to connect and interact with people now." The first day back in the office after the in-service I observed a lot of unusual bustle, as people hung out in each other's areas amidst a general buzz of conversation and movement. It was as if people did not want to disconnect so quickly after two days of engagement, and the collegial interactions continued for about 30 minutes before settling back into the more normal clicking of keyboards and work-related conversations.

Despite the indication that the meeting was effective in achieving the byproduct of developing a sense of community among participants, a comment on the post-survey noted that "a social networking event would have helped us connect in a less formal way." This indicated that staff would have appreciated more opportunities to create informal networks. It also indicated that the involvement of a steering committee during planning would have improved the effectiveness of the meeting in achieving the remaining three objectives.

The involvement of a steering committee had been included in the early project proposal but conflicting organizational priorities, combined with the timing of the external consultant agreement being finalized, made it necessary to exclude this component. There was anxiety on my part concerning this decision because past experience had proven that the staff appreciated having input into meetings that they participated in, and the final design of those meetings was better as a result of incorporating different and often divergent ideas. The Large Group Design (LGD) included self-management tasks throughout the agenda, however, and there had been a number of informal sources of input indicating hopes and priorities for the time together. I set the anxiety aside and made a note to pay attention to data indicating whether or not this had an impact on the meeting's effectiveness.

As planning for the in-service was being finalized, the success from the ACAP Logo Large Scale Meeting (LSM) provided a sense of confidence in the approach being taken for the in-service design. At the same time, two people who had originally been designated to help in the planning of both large-scale interventions had been reassigned at the last minute to work on other priorities. The short amount of time available for the

external consultant to work with and gain an understanding of the Bureau and its environment added a level of concern The approaching gubernatorial election and the unknown impacts of the anticipated change in state leadership were also becoming more of a reality than a mere possibility, creating an undefined yet tangible sense of disquiet.

As the meeting drew closer, staff expressed a general optimism that the meeting would help to connect everyone and address some of the systemic issues people were experiencing. They also were apprehensive about the format, and asked if they were going to "have to put kumbaya puzzle pieces together," "talk about anything personal," or be made to do "trust-building activities like catching each other" or "anything touchy-feely." They were reassured that the meeting activities would be connected to the work and not involve them sharing anything they did not want to.

At this time I was experiencing a sense of isolation and increasing pressure to create an effective meeting. These feelings decreased once the support of an external consultant was finalized, but were also compounded by the lack guidance from an internal steering committee. The Large Group Design (LGD) included components of all the guiding principles, however, so despite the anxiety there was still a sense of confidence that the in-service would be effective in reaching its purpose and achieving its objectives.

A number of new staff members had joined each regional office since the previous staff in-service, so not everyone had met each other; nor did they understand the roles each person held and their relationship to the overall work of the Bureau. The first flow element had therefore been designed to connect people to each other and develop a better understanding of what everyone was doing on a day-to-day basis. Before dividing

into interviewing pairs and moving about the room, people would state their name, the program office they worked within, and describe their role within that program from their seats. The activity instructions were posted to the wall and included in the meeting folders. When the facilitator verbally modeled the introduction, however, the component about individual roles was left out, and during introductions staff members only shared their names and program office.

During this activity I felt increasingly uneasy as I observed people politely introducing themselves as they sat with people from their own office or division, some with their arms folded as they glanced sideways at the blank charts on the walls and markers on the tables. Under other circumstances, I would have been co-facilitating this session, which resulted in a sense of conflict between my role that day as a participant observer and the instinct to step into the facilitator role.

My experience with the ACAP Logo Large Scale Meeting (LSM) had reinforced the LGD approach that if a meeting was designed to include the main flow elements and everything was tied to a clear purpose, then the exclusion of all or part of an activity would not greatly impact the meeting's effectiveness in achieving its objectives. Therefore, rather than interrupting or clarifying the instructions I stated my name and office along with everyone else, and made a note to pay attention to data that emerged about individual roles as well as other indications of items that might have enhanced the agenda.

The introduction "ice-breakers" were described as "a creative and effective way in reaching the objectives," so skipping a small part of the introduction activity did not seem to directly impact the overall effectiveness of the meeting. The fact that 62% of

respondents rated the staff in-service as having little to no impact on the way they carry out their day-to-day work, however, indicated that something else had. The implication is that while 88% of respondents rated the LSM as effective to highly effective in creating a shared understanding of the organizational values and vision, the in-service was not as effective as it could have been in inculcating the values. Cross-tabulating the findings with other factors helped to make meaning of these results.

According to the data, understanding of the organizational values, and the mission built on those values, remained consistent before and after the Large Scale Meeting (LSM), and 88.5% indicated a good or very good understanding of the organizational vision after the in-service. The data also indicated, however, that there was a discrepancy in how people see each of those factors as their individual work relates to them. It is not clear whether the work people do as it relates to the organizational values and vision is simply not understood, or if, for example, some people feel the values do not relate to them personally at all and as a result do not see a correlation to their work.

Additionally, 70% of respondents indicated at least a good understanding of how their work ties to the vision, but the survey data indicated a fairly significant decrease in the understanding of how individual work was tied to values and mission after the in-service. Everyone within the 2-4 years range of employment subgroups, for instance, rated the understanding of individual work as tied to the values in the good to very good range before the in-service. After the in-service, approximately 20% of this combined subgroup was also represented in the category indicating little understanding of the connection.

Furthermore, 100% of the subgroup who indicated they had received little role-specific training rated their understanding of how their work ties to the mission and values, prior to the LSM, as good to very good. After the meeting, approximately half of this subgroup indicated they only had some or little understanding of how their work ties to the mission, values and the vision. The finding was similar for those who rated themselves as having little organization-specific training, although the change in rating of understanding was not quite as significant. Prior to the LSM, 67% of this subgroup rated their understanding of how individual work ties to the mission and values as good to very good. After the meeting exactly 50% indicated only some or little understanding of how individual work ties to the mission or values, which was also consistent with their understanding of the vision.

The open-ended comments help to provide meaning to the scaled-question data sets, indicating that the Large Scale Meeting (LSM) may have surfaced assumptions that people held prior to the meeting about how their work is tied to the organizational values, and the mission built on those values. Comments on the post-survey indicated that while staff members had "started to consider how what I'm working on every day is tied to the values," people also would have liked to hear "X, Y, Z are the values we want to bear in mind while working at BAS because ____" and wished to have walked away with "more information about our future." The combined data implied that the understanding of how the values guide the vision and everyday work of the organization was not as comprehensive as previously thought, and also that the in-service as designed did not provide a means to increase that understanding.

The combined data and findings also helped to explain a discrepancy that emerged between the survey data and the actual meeting outcomes. My participation in the activities had provided an opportunity to engage with people first-hand around the priorities they identified, as well as my own. There appeared to have been some general confusion with the questions throughout the afternoon, as experienced by my group, and people did not seem even moderately excited about the activities. This helped to explain why approximately 20% of respondents indicated that the in-service was somewhat ineffective in identifying the criteria for a new staff orientation program, and after the meeting people noted they "still do not see where those charts on the wall are going." More than half of the respondents, including 50% of founding members, rated the in-service as ineffective to effective in identifying the criteria for a new staff orientation program.

On the other hand, no one left the room and everyone was actively engaged. The ideas captured during the self-managed workgroups were rich and varied and represented the priorities of new staff, founding members, and everyone in between. In fact, the comprehensive list created from the criteria suggested on the pre-survey, combined with the ideas generated during the Large Scale Meeting (LSM) activity, provided over 250 ideas within six primary categories to inform the design of a new staff orientation program. This may have contributed to the finding that 81% of respondents rated the meeting as effective to highly effective in identifying criteria to inform a new staff orientation.

The disparity between the data and the actual outcomes indicated it was an area to consider more closely. From one perspective, the purpose the orientation criteria activity

was tied to, as well as how the data generated would be used, were not clear enough and as a result the meeting was not as effective in achieving this objective as it could have been. During this component of the meeting, I had a sense that framing the activities differently would have created a clearer understanding of these factors for the staff, and I again struggled to maintain my role as a participant observer. This may not have occurred if the external consultant had been able to work with more staff members, or spend time observing day-to-day interactions, prior to the meeting. Spending more time gaining insight into the organization may have provided her with a more comprehensive understanding of factors such as the organizational culture or communication norms, or larger systemic considerations. This in turn would likely have generated ideas for facilitating a sense of relevance between the in-service tasks and people's everyday reality, possibly leading to an increased sense of identification with the organizational values and vision.

From another perspective, the task may have seemed more relevant if additional staff members had been involved in the planning or implementation of the in-service. The indication that the principle of people planning for themselves may not have been applied to its full potential is further highlighted through a post-survey comment that "asking for ideas from staff prior to the in-service....might have made people more vested in the outcomes." On the post-survey, staff members were asked what they would have added or changed about the experience. Asking for similar input during the planning process might have influenced both the agenda and the framing of the activities. Identifying the criteria for "a real employee orientation, which is very much needed" would have likely remained a component of the meeting design. Rather than being an objective in itself, it

may have been incorporated as an activity in an effort to create connections between people's current work and the organizational values and vision.

Such an adjustment may have impacted the finding that people who had been with the organization for 3-4 years, the subgroup who fell into the mid-range of employment, indicated that the overall meeting was less effective for them than for new or founding staff members. Cross-tabulating the open-ended comments with the length of employment indicated that this subgroup would have preferred more time working together on their day-to-day issues, and greatly valued the informal connections that were made. The implication is that this subgroup saw a need to create a vehicle for collaborative problem-solving, and the in-service did not fulfill this need.

Consideration of influencing factors after the meeting provided additional insight into the data findings. The intention of the LGD was to have the whole system engaged in self-managed activities, which the principles indicate is intended to breed commitment to outcomes. The agreement with the external consultant did not include support with the post-meeting implementation of the ideas generated, so there was not an external motivating source to keep things moving. There was also no steering committee to present the list of criteria to, and not enough interest in putting one together after the in-service for the purpose of developing the resulting orientation program despite some initial efforts to do so. As a result, the criteria had been compiled, but no one aside from the Director had seen the resulting list prior to completing the post-survey.

Furthermore, no new staff members were scheduled to start with the organization at that time, and Bureau priorities that had resulted from an electoral change in state administration pulled time and focus to other tasks. Field notes and journals written

directly after the meeting indicated a sense of personal disappointment in the meeting's effectiveness (a sense that had diminished somewhat two months later). The combination of factors made it easier to set aside follow-up steps to the meeting in lieu of other priorities.

While in general the meeting was effective in reaching its objectives, the implication is that the meeting may have been more effective in reaching its purpose through "activities cross-walked...explicitly" to a clear "so-what" factor, in a way that participants could relate to. This would have fostered an understanding of how the criteria development connected to the larger meeting purpose, for example, and further helped create an understanding of how to put the outcomes into action. This may have been achieved through earlier interactions between the consultant and the larger staff, or the increased involvement of staff during the planning stages, both of which would likely have resulted in a more satisfying experience overall. This in turn would have impacted the effectiveness of the meeting in inculcating the organizational values and creating a shared vision.

When the empirical findings were triangulated with observations, the general implication was that the purpose of the in-service did not meet a primary need of the organization. This impacted how the effectiveness of the meeting was rated. Overall, the findings indicated that the Staff In-Service Large Scale Meeting (LSM) was effective in transmitting values and creating a shared vision of the future, but could have been more effective had the Large Group Design (LGD) principles been applied consistently throughout the entire planning and implementation process.

CHAPTER 9

CONCLUSION

Both of the large-scale interventions described in this research project were

designed to explore the discursive methods that support the co-construction, evolution,

and transmission of organizational values and vision. As the findings from the combined

data analyses were reviewed as a comprehensive set, themes toward this purpose

emerged. Based on the common findings, the conclusion is that if Large Group Design

(LGD) principles are applied as an organization goes about its everyday work, it is

possible to develop a shared understanding and generational enculturation of

organizational values and vision. There are some factors, however, that impact the

effectiveness of this approach that organizations should consider when designing a Large

Scale Meeting (LSM) for their own unique purposes.

In comparing the empirical data findings, it initially appeared that the two large-

scale interventions were equally effective in meeting their objectives. For example, 90%

of the ACAP Logo LSM respondents and 88% of the Staff In-Service LSM respondents

gauged the meeting to be effective in reaching its purpose, creating a shared

understanding of values and vision, and providing a means for continued impact in the

larger community. Participants in both settings indicated that personal connections and a

sense of community developed through the face-to-face interactions of diverse

stakeholders with divergent perspectives, and also indicated that having the whole system

in the room was an influential factor in the achieving the meeting's overarching purpose.

Additionally, neither meeting was designed to specifically tie individual roles to

the organizational values or vision, but both meetings effectively surfaced assumptions

held by the participants prior to the meeting about the organizational values in connection to the organization's everyday work. Gaining a better understanding of the values as tied to the mission, for example, may have increased the depth to which people identify with the organization, and therefore increased their commitment to the values (Cheney, 1983). This in turn may have increased the likelihood that the values will be inculcated as people begin to apply them to their day-to-day tasks (Shein, 1989).

When the findings were compared in more depth, however, they indicated that the ACAP Logo LSM was more effective than the staff in-service in creating a shared understanding of values and shared vision, and specifically in inculcating those values. Furthermore, it did so in a way that changed the way people think about their everyday work, and will likely help the program maintain its impact over time. Participants in the staff in-service, on the other hand, indicated that after the meeting they had the same understanding of the values, less of an understanding of how their work is tied to the values, and still had questions about these factors in connection to the organizational vision. Furthermore, the meeting changed the way only a small percentage of participants think about their everyday work.

Another indication that the meetings were not equally effective in achieving their shared purpose, despite the consistency in empirical findings, emerged as the meeting outcomes were compared. Follow-up design meetings with the steering committee and other ACAP Logo LSM participants continued to be part of regular program-wide meetings, and participants asked for progress updates. Six months later, a logo built upon the criteria, or values, had been created with plans for its implementation into marketing efforts underway. Alternatively, after the staff in-service other initiatives took priority

over the design of a new staff orientation program, and efforts to create a cross-sector workgroup to implement the criteria identified during the meeting did not solidify. Six months after the in-service, the diverse ideas generated during the meeting had not been implemented, and new staff continued to join the Bureau with no consistent means to orient themselves to the organization, the autism community, or their specific role within those contexts.

The findings indicated that there were differences in the effectiveness of the two large scale meetings in developing a shared understanding and generational enculturation of organizational values and vision. The challenge then became to determine the reason for the existing disparity between the way the effectiveness of the meetings were rated empirically and what the combined data indicated. Consideration of the themes that emerged through comparison of the separate LSM findings, as well as what the research says about these themes, helped to make meaning of this incongruity.

The overarching theme derived from the data comparison was the importance of considering all of the Large Group Design (LGD) principles and their interdependence during both the planning and the implementation stages of a Large Scale Meeting (LSM). The findings from the ACAP Logo LSM indicated that the meeting was effective because the right people planned and attended the meeting, participants were engaged in dialogue during self-managed group work, and the activities were clearly matched to a meaningful and targeted purpose (Aronson & Steil, 2010; Bridges, 2009; Bunker & Alban, 1997). The survey respondents indicated an understanding of how the input provided during the self-managed workgroups impacted the outcomes of the meeting, as well as how those outcomes would be implemented into a concrete product after the meeting.

In contrast, the findings from the Staff In-Service LSM indicated that the right people were in the room, engaged in dialogue during self-managed work, but the meeting was not as effective in achieving its objectives as it could have been. Specifically, it may have been more effective if the participants had better understood how the activities were tied to the purpose, and if the activities had been more meaningful to the participants. Furthermore, the survey respondents indicated they did not have a clear understanding of how the input provided during the self-managed workgroups impacted the outcomes of the meeting, or how those outcomes would be implemented into a concrete product after the meeting.

Comparing the findings from the two meetings indicated that differences in how they were planned may have contributed to the disparity between their effectiveness in achieving their objectives. For instance, they did not both bring the whole system into the discussion from the earliest stages of planning (Emery & Trist, 1960; Lippitt, 1979, 1980). During the ACAP Logo LSM process, a cross-sector of stakeholders representing diverse perspectives worked with the external consultant to identify the purpose of the meeting, consult on the design flow and activities, and together determine how the resulting criteria would be implemented into a tangible outcome (Aronson & Steil, 2010; Bridges, 2009; Bunker & Alban, 1997). During the Staff In-Service LSM, initial plans for a steering committee were not implemented due to environmental factors out of the organization's control (Martin, 2004), and the external consultant did not have time to gain a comprehensive understanding of the organization or its members prior to the meeting.

The data revealed that a primary need of the organization was omitted from the design flow, which impacted the meeting's purpose, the activities tied to that purpose, and the level of engagement during those activities. Although a diverse set of staff orientation criteria was identified during the meeting, the ideas generated were not implemented into a tangible outcome. The implication is that the difference in how the meetings were planned impacted not only the implementation of the Large Group Design (LGD), but the implementation of the meeting outcomes as well.

An additional theme emerged that is also related to how the meeting components were designed and implemented, and further helped to explain the incongruity in the findings. The combined data indicated that not only is it important to identify a clear purpose and correlated activities that address a real organizational priority, but the implementation of the agenda must be done in a way that provides participants with a sense of fun. The design of an ACAP logo was a real program initiative, and had been systemically agreed was important (Cunningham, 1993, 2003). It was not a project that everyone on the team would have normally been involved with, however. Determining the criteria that would inform the design of the logo was an engaging task that was related to the people's everyday work, provided a chance for them to share their personal stories and hopes for the program, and enabled them to participate in a way that did not detract from individual priorities for any great amount of time (Burke, 1973; Denning, 2005; Flood, 2010).

A sense of energy was documented in both the planning and implementation stages of the ACAP logo design effort, and in general it was recognized that if the specific outcomes of the meeting weren't reached there wouldn't be any serious

consequences for either the program or for anyone professionally. This made it easier to approach the meeting design with a sense of seriousness but also with a sense of experimentation and enthusiasm. The feedback indicated that the "unique" and "fun" collaborative approach taken to identify the logo criteria greatly impacted the diversity of the results, as well as the effectiveness of the overall meeting in creating a shared understanding of the values and vision.

A more serious approach had been taken in the design and implementation of the in-service meeting agenda, and a consistent level of high anxiety was indicated throughout the entire process. A lack of enthusiasm had been documented before the meeting, throughout the meeting, and after the meeting, which indicated that people had not overly enjoyed the experience. The flow element on the second day that included a panel of the organization's program participants was light and more enjoyable, and was the section of the meeting that received the most positive feedback. People indicated they were able to relax after a day and a half of tasks that took them away from more relevant work, and were not necessarily fun to participate in. The feedback further indicated that more opportunities to engage informally would have added to the overall experience.

The level of enjoyment indicated by the meeting participants mirrored my own experience with each effort. The findings also helped to explain why people were willing to continue the efforts from one meeting but not the other. The ACAP logo development provided a justified break from more serious responsibilities, and people indicated interest in seeing how their ideas would turn into a creative product. The follow-up design of the new staff orientation, on the other hand, would have involved committing to a project that wasn't perceived as any more enjoyable than the tasks already on their list

of everyday responsibilities. The implication is that Large Group Design (LGD)

principles are more effective in helping an organization address its complex issues if the

design of the large-scale intervention creates an environment where people work together

to address a relevant issue, in a way that enables them to interact in a less formal and

more enjoyable environment than usual.

In fact, a final theme emerged that further explains the disparity between the

effectiveness of the meetings in achieving their shared purpose, and supports the need to

view a large-scale intervention as an opportunity to create informal learning networks

(Senge, et al., 1990; Trist, 1983). The effectiveness of the LSM in creating personal

connections to the work was rated in the 90th percentile for both meetings, but there were

differences indicated in the data as well. The ACAP Logo LSM findings clearly indicated

this objective had been achieved at many stages of the planning and implementation

processes. People who normally did not interact shared personal experiences and

perspectives with each other, and as a result gained a better understanding of the

population the organization is designed to support; this influenced the way they would

apply the shared values across different situations moving forward (Williams 1979).

The findings from the Staff In-Service LSM indicated that a personal connection

to each other and the work occurred on some level, and the informal networks that

developed would make it easier to accomplish their day-to-day tasks moving forward.

Yet the data also indicated there was not enough purposeful engagement during the

planned activities to fully satisfy this need. Participants noted that more opportunities to

interact with each other through dialogue around their day-to-day issues, as well as

through informal social networking opportunities, could have been built into the agenda.

The implication is that doing so would have created a means for people to engage in on-going dialogue after the meeting had ended, and greatly improved the overall effectiveness of the meeting in achieving its purpose.

Despite the disparity in the meeting outcomes, much was accomplished through the application of Large Group Design (LGD) principles toward the two organizational initiatives. The ACAP logo that was developed as a result of the large-scale intervention represents not only the shared core values that were identified, but also the dominant culture that emerged as a result of interactions between the diverse subgroups that comprise the program (Martin, 2002; Martin & Siehl, 1983). In conversations with participants of the meeting, there are indications that the team now recognizes that despite their divergent perspectives, a shared set of valid assumptions and values had indeed formed over time. The new awareness of those shared values has impacted how they identify with the program and how the values guide their everyday actions across different situations. It seems that participation in the meeting did lead to an identification with and acceptance of the shared organizational values.

Furthermore, the success of the ACAP meeting provided an example of a small change that had positive effects and as a result influenced the support to apply the same strategy to the design of the staff in-service. For example, the success of the ACAP meeting increased my personal level of confidence in the intervention as well as in my own ability to apply the intervention effectively. It also increased the confidence of my colleagues in those same areas, and as a result decreased some of the anxiety that emerged during the planning stage for the second Large Group Meeting (LGM). Although the Large Group Design (LGD) principles were not consistently applied

throughout the planning and implementation process, the meeting was still effective in creating a shared understanding of values and the organizational vision.

There are many external circumstances out of the organization's control that may trigger changes to its day-to-day operations and impact the future of the organization(Martin, 2004). My sense is that there is still a need, and enough support, however, to design a future opportunity for the staff to come together to build upon the initial successes from the two large-scale interventions. This could provide a means for current staff members to work collaboratively to address relevant issues, and gain an understanding of each other's contribution to the organization as they relate to the values, in a way that is enjoyable for the participants. Additionally, the findings indicated that the Large Scale Meetings (LSM) were most effective in helping new staff members gain an understanding of the organization and its values. This implies that the approach may be an effective means to influence the way new staff members who enter the organization understand and apply the organizational values to their everyday tasks. In other words, additional large-scale interventions involving current and new staff may increase the likelihood of the transmission and enculturation of the organizational values, and result in the co-creation and a deeper understanding of a shared organizational vision. This might then increase the likelihood that a shared understanding of the values and vision would inform individual actions across myriad situations (Rokeach, 1986; Williams, 1979), and help the organization maintain its impact over time.

Even when implemented imperfectly, the application of large-scale intervention principles to an organization's everyday work is an effective approach for organizations looking to solve complex systemic issues. Since organizations and their issues are unique,

the flexibility to design a Large Scale Meeting (LSM) specific to the organizational

culture, needs, and available resources (including time) is necessary. For that reason,

there is great value in understanding the design structure of differing large-scale

intervention models based on these principles, as they may each be effective in different

situations.

The core message, however, is that purposeful consideration of the underlying

principles as a large-scale intervention is designed and implemented, is the underlying

factor in ensuring an organization's effort is highly effective and endures after the

meeting. As organizations face rapidly changing and increasingly complex issues, it is

critical they take advantage of potential opportunities to maintain their impact over time;

Large Group Design (LGD) principles provide an effective means to do so.

CHAPTER 10

INDIVIDUAL LEARNING SUMMARY

Throughout the course of the action research process, several themes emerged that increased my understanding of what was occurring as related to the project, and also contributed to my overall learning as a practitioner and a researcher. To begin with, a key factor in the planning and implementation of each project was time. More specifically, the timing of the initiatives, as related to other internal and external circumstances occurring during the same timeframe, influenced the process. This was reflected in how much priority was given to each effort; the depth of orientation to the organization the external consultants were able to gain; and the level of organizational and individual commitment to meeting outcomes.

Many of these circumstances were out of my control. The ever-changing process was frustrating but fairly typical, and therefore not completely unexpected. The experience taught me that it is important to purposefully and realistically consider the amount of time and commitment initially available for an effort, as well as influencing factors that may impact the original plan, when determining the scope and design of future interventions.

The amount of time available for each initiative also influenced the research process itself. Specifically, although I was aware that empirical data instruments should be tested before they are administered, there was not enough time to develop, test, and adjust each one while simultaneously creating a secure data collection process, serving as an internal design practitioner, and managing professional responsibilities outside the scope of the project. The experience taught me the value of well-crafted empirical tools

that result in valid data and defendable findings, and encouraged me to increase my ability to design better instruments moving forward.

This experience also taught me that there are many challenges in balancing dual and often conflicting roles. There were a number of times that I had to choose between my role in the organization, my role in the meeting process, and my role as a researcher. The importance of having the objective support and advisement of others throughout the process was an instrumental factor in maintaining the integrity of the effort, and enabling me to honor my multiple professional commitments. The experience emphasized my belief that a collaborative approach is necessary not only for organizations looking to address complex issues, but also for practitioners supporting those organizations in their efforts.

Overall, this research project was reflective of my experience with the Organizational Dynamics program. It began with a question based on prior experiences, tested and expanded my skills, and pushed me to figure out new and better ways to approach the tasks at hand. My understanding of complex social systems has increased exponentially, and at the same time the experience has unearthed countless opportunities for future exploration. In the spirit of W.E. Hocking, I can only begin to imagine the unbounded possibilities.

1 Richard Harriman is Managing Partner of Synectics Corporation and Cofounder and CEO of Inventive Logic, Inc. He was the keynote presenter during the January 12, 2008 Organizational Dynamics Brunch at the University of Pennsylvania.

2 Formal systems that indicate an organization's values include those such as mandatory trainings, staff orientation and development, or reward systems. Informal systems include those such as dress code policies, office arrangements or meeting attributes (e.g. invitations, seating arrangements) (Schein, 1989).

3 A meeting classified as "large-scale" indicates that the design can support the participation of a large number of stakeholders, rather than being a reference to the scope of the topic or issue being discussed (Chase, 1996).

4 Examples of specific outcomes-based models for bringing large groups of people together include Future Search (Weisbord & Janoff, 2000), Appreciative Inquiry Summit (Cooperrider, 2000), Emery Search Conference (Emery & Purser, 1996), Interactive Planning (Ackoff, 1994, 1999) and Axelrod Design Conference (Axelrod, 2000).

5 The primary subculture divisions observed that may have relevance to the scope of this research include, but are not limited to: contract staff and state staff; date of hire (e.g. founding members or new hires); people who can work from home and those who must maintain a set schedule; differing levels of access to the Bureau Director, meetings and information; regional office assignment; office space and cubicle sizes; staff members with a personal connection to autism and others who simply see employment with the Bureau as a job.

6 Major forms of action research include Argyris' Action Science (1995), Heron & Reason's Cooperative Inquiry (1997), Freire's Participatory Action Research (PAR) (McTaggert, 1997), Torbert's Action Inquiry (2004), and McNiff & Whitehead's Living Theory Approach. (2002).

7 Kurt Lewin and his associates are considered to have largely developed the basic principles of action research, including the integrated role of data and theory in guiding a systemic and iterative research process (Argyris, 1993; Coghlan & Brannick, 2001; Cunningham, 1993; Small, 1995).

8 *Primary access* refers to the initial authority a person needs in order to undertake the research process in an organization. *Secondary access* is dependent on the researcher's position within the organization, and refers to formal and informal networks at different hierarchies, documentation, data, people, or meetings (Coghlan & Brannick, 2001, p.52).

9 Wesibord & Janoff (2007) note that participants should represent the whole system, which includes people who have (1) the formal authority and resources required to act upon the issue; (2) the expertise to understand and deal with the issue; (3) information about the larger system; and (4) a need for the issue to be addressed.

10 The primary role of the facilitator in a large group intervention is to guide the flow of the meeting while groups self-manage tasks such as timekeeping, recording ideas, and reporting out to the larger group (Weisbord & Janoff, 2007).

11 Each person on the steering committee held membership in more than one of the overlapping and coexisting subcultures that comprise the program (Meyerson & Martin, 1987). The primary perspectives represented included BAS staff, ACAP staff, program operations, clinical, administration, founding members, and ACAP communication and marketing.

12 John Arva is a designer with 30+ years of experience in the development of logos and marketing initiatives, as well as the facilitation of meetings. He also brought a personal understanding of autism and the ACAP initiatives to the planning group.

13 The primary perspectives represented during the LSM were expanded from those of the steering committee to also include ACAP program participants, family members, recently employed staff, and staff from each level of hierarchy such as executive and direct support staff.

14 The initial timeframe for project completion was October 2010. During this timeframe a new ACAP Program Manager joined the staff. It was decided to extend the target date for completion of the logo development to ensure continued commitment to the initiative and support of the final design (Feldman & Spratt, 1999).

15 Lonnie Weiss, MA, CPF, Weiss Consulting, LLC, has 30+ years of experience working with organizations to build consensus and collaboration around complex issues through facilitated interventions. The services contracted with the Bureau of Autism Services were provided between September 1- October 8, 2010.

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APPENDIX A

Principles of Effective Large Group Design and Facilitation

I.   **The Golden Rule: Right Task + Right People + Right Tools = Effective Design**

    A. Right Task: See Clarity of Purpose below.

    B. Right People: See Whole System in the Room below.

    C. Right tools: See everything else.

II.   **The Big Eight**

    A. Clarity of Purpose

        1. Group development and performance cannot proceed without this.

        2. Purpose should be as broad as it needs to be.

        3. But no broader – the narrower the purpose the faster the group matures and the faster it performs.

    B. Active Engagement – around real work and real decisions

        1. People need to be actively engaged if they are to truly influence – and be influenced by – the process of the meeting. Listening to presentations and having the opportunity to ask a question or two is not enough engagement to make substantive change.

        2. A large-group (working) meeting is not a workshop, not a training. The work takes place in the meeting, and requires the collaboration and creativity of everyone.

    C. Whole System in the Room

        1. Our world of rapid change needs the first hand expertise and data of the people in the front lines of all parts of the organization or community.

        2. Participation breeds commitment.

        3. If people are to make decisions on behalf of the whole – as opposed to more narrow interests (the interests of their division, or their function, or their group, or themselves) - then they need to identify with the whole system. For this to happen, they need to *see* the whole system that is in the room and *experience* that they are part of this system. Meeting design needs to take care of this.

D. Development of a Shared Understanding of the Context

1. The meaning of everything we think, feel, and do is in the *context* of those thoughts, feelings and actions.

2. If we are to have shared meaning, we need to have a shared understanding of the (relevant) context (s).

3. Shared understanding of the context emerges from mutual, active exploration.

E. Self Management of Working Groups

1. Responsibility for work and action emerges more readily when groups take responsibility for their own process.

2. When outsiders facilitate working processes, ownership and responsibility is slowed down.

3. Minimal facilitation is best.

4. Groups of eight or fewer are best left to take total responsibility for themselves – no facilitation and no eavesdropping.

F. Discovery of Common Ground

1. Our areas of disagreement can obscure what we agree on, and what we are willing to take action on .

2. Actualizing our potential as a group, as an organization, or as a community requires conscious focus on, and discovery of, common ground.

G. Focus on the Future

1. Most organizations and communities have more problems and issues than can possibly be solved or resolved in any living member's lifetime.

2. The best way to prioritize what needs to be done is not to prioritize what needs to be done, but to focus on a desirable future, and to let a shared dream of that desirable future draw energy and action to it.

3. Therefore,

   a) Acknowledge the past

   b) Acknowledge the present

   c) Focus on the future

H. Equal Standing

1. Everyone has an equal opportunity to speak and be heard.

2. Everyone's perspective counts.

3. Leaders may assert their nominal power at planned moments, but otherwise participate as equal with everyone else.

III. **Eight Also-Big**

A. Open (Visible) Data and Data Bases

1. Trust is enhanced when information and data relevant to the purpose of the large group is open to everyone.

2. Keeping data and databases displayed in the room demonstrates openness.

3. Displayed data also helps those participants who are not linear learners.

4. Handouts and the use of video screens for presentations contribute less to the feeling of openness than do flipcharts and wall charts of all kinds.

B. Experience of the Equal Humanness of All Participants

1. The authenticity and effectiveness of dialog and discussion is enhanced when participants have the experience of being equally human.

2. Small experiences make a big difference – sitting at a round table, sharing personal successes, failures and aspirations.

C. Transparent Decision Making

1. Whatever the decision making process, it needs to be understood at the beginning, if trust is to be preserved.

2. People are generally willing to have a leader make a decision on their behalf when they feel that all relevant perspectives have been voiced and heard, especially their's.

D. Full Attendance

1. Changes in the makeup of any group have a negative effect on that group's development, maturity and ability to perform. Large groups are no exception.

2. Allow people to come late and/or leave early only when absolutely required.

E. Development of Group Perspectives from Individual Data

1. When individuals share their perspectives in a group (where the conditions for authentic discussion and dialog prevail), the group will develop a perspective of its own that is different from the starting point of any of its members.

2. When this occurs, members will adopt and take responsibility for their group's perspective.

3. Groups can be surprisingly creative.

4. Beware of premature voting. It can have the effect of freezing individual perspectives – the opposite of what is needed to discover common ground.

F. Knowledge is in People

1. Although possibly less accurate than what is written, people generally operate day to day on the knowledge that is in their head.

2. The knowledge that people contain in their heads may be more complete, more detailed, and/or timelier than anything that is written.

3. Invite the people who have the best knowledge of the perspective of the group they represent within them.

G. Rationalization of Conflict

1. The purpose of rationalizing conflict is to precisely (and rationally) identify the line between agreement and disagreement, and thereby to establish common ground.

2. The goal is not to negotiate a compromise or gain grudging agreement, but to respect conflict and to thoroughly understand it.

3. During a segment of a large group meeting that seeks common ground, areas of potential disagreement usually emerge. At that point it is wise to attempt to rationalize the disagreement in the large group, clarifying what is agreed and what is disagreed. Should this become cumbersome, conference managers may appoint two or three people to work offline to rationalize the conflict. If they succeed the large group must confirm their rationalization. Should all attempts fail, the issue in dispute is placed on an honored list of disagreements.

H. Length of Meeting Proportional to Breadth and Complexity of Purpose and the Degree of System Coherence (fragmentation)

1. Large groups can come to agreement and perform in a half-day when purpose is straightforward and the task is simple and there is already systemic alignment in place.

2. Large groups may require four or five days to come to agreement and perform when the purpose is involved and/or the task is complex and/or the system lacks coherence.

Case Listening Tool

(Client Name)

Directional Coherence

In thinking about this core issue...What are people on the same page about?

What do they need to be on the same page about?

Relational Coherence

What is the state of the relationships between components of the system, particularly around this issue?

Who needs to have ownership in this issue for it to be successful?

What are the "parts" that need to connect to experience their interrelationships around this issue?

Fragmentation

How is the system fragmented around this issue?

How does this fragmentation impact the core issue?

Relational

Directional

What is the core issue in the story told by the client?

Is it systemic?

Briefly describe the system

Task

RESULTS

Contextual

Results

If the issue is successfully addressed what will be different in the system?

Contextual Coherence

To what degree is there a shared understanding of the context for this core issue - historical, environmental?

How is the system engaged with its environment - passively, actively, unengaged?

Who are external stakeholders who can help the system impact this core issue?

Task Coherence

How does the system and its components view what needs to be done to address this core issue?

Flow Element	Database	Activity	Clarity of Purpose	Active Engagement	Whole System Aware	Shared Context	Self-management	Common Ground	Focus on Future	Other Principles or Rationale

Flow Element	Database	Activity	Clarity of Purpose	Active Engagement	Whole System Aware	Shared Context	Self-management	Common Ground	Focus on Future	Other Principles or Rationale

Appreciative Interviews

Purpose: Appreciative Interviews are a way to explore the positive core of an organization, community, or topic being studied. They help illuminate the distinctive strengths of the system when it is functioning at its best. Appreciative interviews also build community and connection.

Group Configuration: Pairs; small groups

Process: Individuals are invited to pair up with someone they do not know well. Using a set protocol, each person interviews his or her partner for approximately 45 minutes each. Pairs join with 3 other pairs to form a small group of eight. In a go-around--partners are introduced, highpoint stories are shared and the information is analyzed for "root causes of success" (or some other way of asking about the positive core).

Results/Outcome: Root causes of success—strengths, capabilities, values—as well as possibilities.

Number of Participants: 30 to 1,000

Special Materials/Logistics: Worksheets, markers, banner paper

Principles: Active engagement, self-management, equal standing, focus on the future.

Sample Worksheets:
#1--Appreciative Interview Guide (from The Appreciative Inquiry Summit)
#2--Home grown guide and worksheets used with a large leadership team

Note: Appreciative Interviews are also used in applications other than AI Summits.

APPENDIX B

ACAP Meeting Post-Assessment Survey

Assessment Purpose: To gain information about the effectiveness of this discussion in meeting its intended purpose. This information will help guide our communication efforts as we develop ACAP marketing materials. It will also help BAS plan future meetings for multiple initiatives based on this same approach.

Confidentiality: The perspective you share will be kept confidential and will only be used to identify general themes that will help guide future efforts.

Meeting Purpose: To identify the criteria to be used in the design of an ACAP logo, with implications for additional marketing strategies

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1. What three words or phrases would you use to describe the meeting?

- _____
- _____
- _____

2. How effective was the meeting in achieving its purpose? Select one rating below.

Completely Ineffective	Somewhat Effective	Effective	Very Effective	Highly Effective

3. Based on your rating in question #2, briefly describe what made the meeting effective or ineffective.

4. What impact did the meeting have on the way you think about ACAP or adult programs in general, or on the way you are going about your day-to-day work? Please be specific.

Meeting date: 8/24/2010

5. What outcomes of the meeting surprised you, if any?

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6. If the criteria generated by the group are incorporated into a logo and other marketing efforts, describe the impact you think it will have on the program.

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For each statement below, determine and check off the extent to which you agree or disagree with the statement.

1. **The list of descriptive words and phrases identified as the criteria were the values that ACAP was built upon.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

2. **My values for ACAP were included in the criteria that were identified**.

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

3. **My values for ACAP were understood by all stakeholders *before* the meeting.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

Meeting date: 8/24/2010

4. **I better understand other people's values and priorities for ACAP as a result of this discussion.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

5. **The priorities that were identified will help us communicate the values of ACAP to potential participants and family members.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

6. **My participation in this discussion impacted the outcome.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree

Please indicate how much of the time you were actively participating in the meeting.

Not at all	A small amount of the time	Some of the time	Most of the time	The entire time

Please add any final thoughts about the meeting, discussions, or the outcomes that you'd like to share.

Meeting date: 8/24/2010

ACAP Meeting Post-Assessment Survey
DATA COLLECTION SUMMARY

Assessment Purpose: To gain information about the effectiveness of this discussion in meeting its intended purpose. This information will help guide our communication efforts as we develop ACAP marketing materials. It will also help BAS plan future meetings for multiple initiatives based on this same approach.

Confidentiality: The perspective you share will be kept confidential and will only be used to identify general themes that will help guide future efforts.

Meeting Purpose: To identify the criteria to be used in the design of an ACAP logo, with implications for additional marketing strategies

	Effectiveness of the meeting	The criteria were the values that ACAP was built upon.	My values for ACAP were included in the criteria.	My values for ACAP were understood before the meeting	I better understand other people's values as a result of the meeting.	The priorities identified will help communicate values of ACAP	My participation in the discussion impacted the outcome	I actively participated in the meeting
1	4	5	5	3	4	5	4	4
2	4	4	5	3.5	5	5	4	5
3	4	4	5	3	4	4	3	4
4	2	5	4	3	4	4	4	5
5	4	5	5	4	4	4	4	5
6	4	5	5	3	5	5	4	5
7	3	4	4	4	3	3	3	4

1. What three words or phrases would you use to describe the meeting?

collaboration of ideas (2)	multiple perspectives of ACAP	open discussion
organized (2)	purposeful	unique
informative	focused on task	fun (2)
interactive	open	respectful

1. Interview Question: In your own words, describe the meeting and its outcome as if you were talking about it with someone who wasn't there.

• We set up what the purpose of the meeting was for and we had the agenda, and I believe that the purpose of the meeting was communicated at the onset of the meeting. We went through the agenda, checked in with where we got to, what value we could gain from the meeting, getting everyone's input, identifying diff perspectives, etc.
• It was a process around brainstorming, a meeting where ideas were generated to capture the most striking and outstanding aspects, benefits, and qualities of the ACAP program. We we able to capture the key concepts and ideas that are "language" now, but will be translated at a future point to help insulate these into future efforts – including a logo.

Follow-up Question: What would you say we accomplished?

• A solid foundation going forward as to having a lot of terminology and free flowing ideals about what a logo could look like. I would take 2-4 of the ideals back to the large group once more concrete designs were established.

2. How effective was the meeting in achieving its purpose? Select one rating below.

Completely Ineffective	Somewhat Effective	Effective	Very Effective	Highly Effective
0	1	1	5	

3. Based on your rating in question #2, briefly describe what made the meeting effective or ineffective.

• There was representation of all stakeholders present and the forum generated an atmosphere that fostered and encouraged expression of ideas and thoughts.
• Having a specific goal and having the activities logically connected as a "building" toward the ultimate goal.
• Good facilitating allowed the process to move along without getting stalled or sidetracked (too far).
• Everyone's input was valued and everyone participated. It was also nice to have the perspective of participants in ACAP.
• I thought it was effective in large part due to bringing in various perspectives, experiences, and ideas in addition to making it interactive in such a way that not only required everyone to participate but also made it feel safe and fun to do so.
• I would have rated it a 5, but when walked out of the meeting I said to myself maybe we got too close to the subject. If it had been broader I would have said words like innovative and cutting edge during the activities. Because it was about ACAP and the artist was there, we got very focused on ACAP. But I think I would go a step beyond what we did in the meeting to describe the program. I think this could even be applicable to the younger population. I would somehow communicate that because they

have learned to cope but we can help them can figure things out; they're out on the street, stuck on the computer...so I would say something about the younger generation.
- Participants' participation. He shared his story. I'm not sure he was linking into the image of the program, just interested in what we were doing so he provided raw data that wasn't influenced by anything else.
- Small group work was helpful versus a large group where everybody maybe won't speak up.
- I think people felt very comfortable sharing and their ideas were respected. There was a great blend of BAS and KAS (including various levels of staff, not just mgt.), as well as Participants, and marketing experts so the meeting stayed on task and flowed very smoothly.

4. What impact did the meeting have on the way you think about ACAP or adult programs in general, or on the way you are going about your day-to-day work? Please be specific.

- I felt I understood the individual's desires and goals of ACAP due to my participation in the ISP process.
- It had an impact. It really came down to having met that participant. I'm not not sure, but it gave the program more meaning for me. I have the programmatic thing/understanding, but everyone else on on the ACAP staff has a family member or personal connection or work experience, and I hadn't met any of our participants before.
- I do not think that the meeting changed the way I think about the program or conduct my work.
- It shows that ACAP is only effective if everyone comes together as a team and works toward the common goal. There is a lot of work ahead of us, but it can be done, one step at a time.
- It was reaffirming to meet the 2 individuals who are current participants in ACAP – meeting them and hearing their thoughts about the program really helped me make a more tangible connection between the work we do here in the office and how it affects the participants.
- It's probably not impacting my work, but it is impacting my way of thinking in terms of the need for an image or a slogan to use across time. I am thinking about the CHIP program – I don't even know what their logo stands for but I know what it is. At some point in time, it would be nice to have the ACAP **image embedded in the public conscious** – so people say, "adults with autism, oh yeah, that's cool, that's right out there...that program helping them improve their life and change what they're doing.
- Actually, I'm going to give that some thought. I'm going to start thinking about using imagery with my clients. I like that, too...in fact, this WILL influence the kind of words that I'll use. I didn't think of it because I thought my purpose* during the meeting was the focus, but it's a great way to think about the compass idea, and lots of things come to mind about how I can use these words to describe their planning to them and their families. (*clarified during interview: this person went into the meeting thinking the purpose of participating was to represent a specific perspective in the small group activity).

- Challenged me to continue thinking about messages that we are both intentionally and even unintentionally delivering to the autism community at large as we market ACAP. How do we market to people with various level of need, etc.

5. What outcomes of the meeting surprised you, if any?
- No – we accomplished what we wanted to in that meeting.
- The word list was impressive, creative, and comprehensive.
- No real surprises, but a definite energy noted for the project.
- I was surprised that the VP of Marketing was not more creative in her thinking. She was trying to pigeonhole while I was thinking in images. The people who are supposed to have expertise had less creativity.
- I saw people talking to each other and partnering that I would never have believed before. They were actually listening to each other...and agreeing!
- A lot of people put the sticker* on the same values...independence...collaborating and working with others in different systems. It really surprised that everyone was thinking the same way (in a good way).They're doing good work but by and large I am just glad that everyone has that same understanding of it, except for that one person was a bit smaller-minded. But you can't get everyone on the same page about everything.
* *during voting to prioritize criteria*
* Nothing necessarily surprised me.
- I don't recall anything really surprising me…

6. If the criteria generated by the group are incorporated into a logo and other marketing efforts, describe the impact you think it will have on the program.

- It's going to give it an identity – the cooler the logo the more of an identity it's going to get. It needs to show how it's different form other programs because it is the first.
- unsure
- This will increase the visibility and allow the program to stand out from other programs like the Autism Waiver and MR Waiver.
- Having a clear and unique identity will increase enrollment and perhaps be seen as a positive by participants.
- I think it will give everyone something to relate to and continue to build the foundation for the success of the program.
- I believe it will help make the program become more recognizable not only among the ASD community but also in the general public which could possibly lead to more referrals/applications and overall growth of the program. It may also lead to increased interest among potential network providers which would in turn offer more healthcare choices to the participants.
- I hope and imagine it would increase participation so that people who need it or that are living with autism will see it. There will hopefully also be a secondary impact in the general community by an increased awareness that ACAP is out there. Then people don't have to worry so much about what's going to happen to them because there's a program out there to help.

• I think that the active involvement of current ACAP participants and staff will prove positive as their viewpoints obviously differ from mine as a staff member and may attract others living with ASD to the program available.

For each statement below, determine and check off the extent to which you agree or disagree with the statement.

1. **The list of descriptive words and phrases identified as the criteria were the values that ACAP was built upon.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree
0	0	0	3	4

2. **My values for ACAP were included in the criteria that were identified**.

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree
0	0	0	2	5

3. **My values for ACAP were understood by all stakeholders *before* the meeting.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree
0	0	5	2	0

4. **I better understand other people's values and priorities for ACAP as a result of this discussion.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree
0	0	1	4	2

5. **The priorities that were identified will help us communicate the values of ACAP to potential participants and family members.**

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree
0	0	1	3	3

6. My participation in this discussion impacted the outcome.

Strongly Disagree	Disagree	Unsure	Agree	Strongly Agree
		2	5	

Please indicate how much of the time you were actively participating in the meeting.

Not at all	A small amount of the time	Some of the time	Most of the time	The entire time
			5	2

Please add any final thoughts about the meeting, discussions, or the outcomes that you'd like to share.

• I was disappointed that there were not either a couple more ACAP participants or some family members involved as the group was largely the operational/clinical staff. While the 2 participants that were there were very influential in the outcome of the meeting, I believe maybe just 2 more or 2 family members in particular would have been able to enrich the discussion by bringing in another vantage point. However, aside from that I was very pleased with the meeting and outcome.

• I'm really glad you had the participants in the room; that was really excellent. And frankly, [program participant] was strong, articulate, and visual and stood up to the group.

• People skipped over the last part of what we needed to do in our folders, but we still came up with the same outcomes. Maybe we needed more time, or needed to eliminate a step in the agenda, but then we might have missed something we needed to do. I was a little worried that we might have skipped something valuable, but the end result was reached so I thought it was ok, but I wondered about it.

Interview Clarification: *Did we miss a perspective?*
No. We had that. I am SO GLAD [the ACAP participant] was there because she said things like, "That is not creative. That is not hitting me. That's not going to catch me. It's boring." She's young. She's right. **We were coming up with an image of a program – she was coming up with an image about herself.** I think more didn't come up because we don't want to cross [Executive Staff Member], right?

[The program participant] had the image and did a great job. I walked away wishing my group had come up with more. How that will translate into an image I don't know, but I know that WILL happen and I'm so glad the artist that will design the logo was there to hear the discussion first-hand.

E. Wexler, Project Facilitator   LSM date: 8/24/2010

Adult Community Autism Program (ACAP)
(Client Name)
Case Listening Tool

Directional Coherence

In thinking about this core issue…What are people on the same page about?
Communication needs to directed with the right message for the right audience based on input from all perspectives – we haven't always done that but have learned a lot about the consequences of omissions and the importance of doing things differently moving forward.

What do they need to be on the same page about?
Marketing cannot be dependent on one provider's perspective of the program. The message needs to be developed so that it captures the values of the program and can be generalized as ACAP expands to include additional providers.

Fragmentation

How is the system fragmented around this issue? How does this fragmentation impact the core issue?
BAS needs consistent marketing materials that notes our oversight (required) and can be utilized by other providers as the program expands. KAS wants to highlight its unique role as a leading provider of adult services and often lists themselves first or leaves BAS out entirely.

Contextual Coherence

To what degree is there a shared understanding of the context for this core issue - historical, environmental? Moderately high

How is the system engaged with its environment - passively, actively, unengaged? Actively engaged but on different levels and for different purposes

Who are external stakeholders who can help the system impact this core issue? Program participants and family members; a mix of ACAP provider staff and BAS staff from different perspectives (operational, clinical, administrative, marketing)

What is the core issue in the story told by the client? *Communication has not always been effective in getting across the unique characteristics of this new program. In fact, it's unintentionally offended some of the people we are looking to support as program participants. Clearly articulating and communicating the strengths of the program needs to be consistent and generalized across program sites.*

Briefly describe the system: *governmental with contracted staff; state agency administers the program; one private provider contracted to implement it ; expansion to include other providers in different regions of the state is planned*

Relational Coherence

What is the state of the relationships between components of the system, particularly around this issue? Who needs to have ownership in this issue for it to be successful? What are the "parts" that need to connect to experience their interrelationships around this issue?
Overall there has been collaboration between BAS (state administering agency) and KAS (first and only contracted ACAP provider). BAS has oversight over all marketing materials. KAS is required to run all marketing materials by BAS, but that hasn't always happened without monitoring. KAS' parent organization has a marketing division that is not involved in the day-to-day operations of ACAP. They often send out their own materials without consideration of the agreement stating BAS has oversight of all materials. Two meetings have been held to include the VP in marketing discussions and some initial positive relationships have been formed.

Results

If the issue is successfully addressed what will be different in the system?
Marketing materials used by BAS and KAS for this program will include consistent language and one logo that represents the program. It will include a unified message designed purposefully for the target audience. Communication will effectively transmit the program's strengths in a way that captures the needs and language of program participants. Individual providers will have a way of honoring the agreement with BAS while also highlighting themselves.

Task Coherence

How does the system and its components view what needs to be done to address this core issue?

Designing a logo for ACAP is a tangible means of doing this. It also provides an opportunity to bring all ACAP stakeholder perspectives together to identify the key components of ACAP. The themes that emerge will impact more than the logo design.
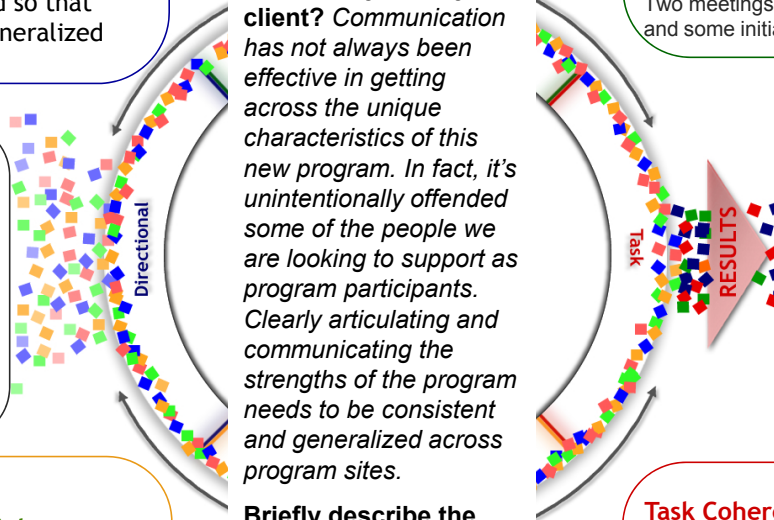
Bureau of Autism Services, DPW: ACAP Logo Design
Meeting Date: August 24, 2010   12:30-2:30 p.m.
Erica Wexler, John Arva

Time	Length	Who	Flow Element	Activity	Logistics/Materials
12:30-12:40 B	10 min	Erica John	**Purpose** *Clarity of Purpose* *Ground Rules* *(confidentiality)*	Identify criteria that will be used to design a logo ~ Not designing logo today ~ Criteria will be used to design 3 different logos ~ Group will vote – take back to larger group for voting Larger implications: themes identified about what we want in the logo will impact our understanding of the language used to describe the program and will set the groundwork for what will be used as ACAP expands; wrong logo design could unintentionally send the wrong message	Posted on chart in advance
12:40-12:50 B	10 min	Tim/Drue	**History of Communication Efforts** *Clarity of Purpose* *Whole System Aware*	• Past six months • Lessons learned • Outcomes/tangible materials • Implications for logo design	
12:50- 1:05 B	15 min 15 participants 1 minute each	Whole Group	**Introductions** *Whole System Aware* *Inclusion* *Discovery*	1. Name 2. Role with Program (*note:* Erica clarifies her role for today as guiding meeting not participating in discussion) 3. What first attracted you to your field of work/to ACAP? – 1 sentence	Posted on chart in advance
1:05 – 1:40 B	15 minutes per pair 5 minutes of self-reflection	Pairs	**Appreciative Interview** *Active Engagement* *Self-Management* *"equally human/equal standing"* *Discovery*	*Moments of Meaning:* Describe a personal high point for you with services. Be specific and tell me what happened, who was involved (respecting confidentiality), where it happened. Tell me about the experience and how it impacted others involved. *(not ACAP-specific)* *Individual Reflection:* ~ What part of your partner's story captured your attention, and why? ~ As you listened to your partner's story, what was at the heart of what made it a good experience?	A.I. question typed on colored paper with room for notes

Large Group Design and Facilitation 2006   Nancy Aronson and Gilbert Steil, Jr.

Time	Length	Who	Flow Element	Activity	Logistics/Materials
1:40-2:15 M	35 minutes	Small Mixed Group	**Appreciative Interviews: Critical Success Factors** *Active Engagement* *Self-Management* *Common Ground* *Focus on Future*	AI: Use the questions below to guide discussion. 1. What can the story you heard in your interview teach us about what adults look for in a service program like ACAP? 2. What words or themes did you hear capture the criteria that describe ACAP when it works? 3. If you imagine ACAP in five years meeting the greatest success, what words would you use to describe it? As a group, write the top five words or phrases that you think are the most important criteria that should be used to capture what ACAP is and how it looks when it works. POSTED	AI Critical Success worksheet w/self-management responsibilities *different colored paper Per Group: Chart paper Markers masking tape smaller paper
2:15-2:20 C	5 min	Whole Group & Individual	**Vote on Criteria** *Clarity of Purpose* *Active Engagement* *Self-Management* *Whole System Aware* *Common Ground*	Look at criteria – Vote on top three criteria that should be considered in the development of a logo ~ voting doesn't eliminate the other characteristics, but will narrow down to the "must haves"	Stickers (3/person)
2:20-2:30 C	10 min	John	**Clarify Next Steps** *Whole System Aware* *Focus on Future*	Logo – you've said what it is – also tells a lot about what you DON'T want it to be Next Steps: take criteria, develop logo designs, will bring back to group within two weeks	

Large Group Design and Facilitation 2006   Nancy Aronson and Gilbert Steil, Jr.

ACAP Logo Design Meeting
"Our Program at its Best"

Tuesday, August 24, 2010
12:30 – 2:30 pm
Location: Keystone Autism Services

Purpose: To identify the criteria that will be used to develop an ACAP logo

History of ACAP Communication Efforts: Drue/Tim

Introductions

Task:
Critical Success Factors for Adult Autism Programs
- Personal experiences
- ACAP in the future
- Identify themes, key words, and phrases = criteria
- Vote on criteria

Next steps

(POSTED ON Wall)

1. What attracted You?

Think back to when you first decided to join ACAP. What attracted you? What were your first excitements?

ACAP

"Our Program at its Best"

Purpose: To discover the words and phrases that capture what ACAP is and how it looks when it is at its best.

Guidelines:
1. Select a partner you don't usually work with from your table group. If you know everyone at your table well, try to find a partner from a different table.

2. Talk to your partner using the guiding questions on the next page. Each pair will have 15 minutes to work together.

3. Encourage your partner to tell his or her own story; draw him or her out with your positive energy and curiosity.

4. Take good notes and listen for **great quotes and key words** in his/her story. Listen as if you had to retell the story yourself. You will share the highlights of your partner's story in the next part of today's discussion.

5. The information you collect from these questions will be used to shape the criteria that should be used to design an ACAP logo.

Inquiry into the Criteria of Effective
& Meaningful Services

Moments of Meaning

Describe a personal high point experience as a service provider or as someone who received services – a time you will always remember as a powerful, peak moment -- a time that showed excellence in services for individuals with autism. Be specific and tell me:

* **What** happened?
* **Who** was involved in making this a positive experience? What was their role in making this experience a high point for you?
* **Where** did it happen (at home, in the community, at work, etc.)?
* What were **the most important factors in the services** that made this an experience you remember (e.g. the person you were working with, best practices, the type of support or service provided, the location, relationships)?

**Tell me about the experience and how it
made a difference for you and the others involved.**

NEXT STEPS

Once you have both shared your story, please look at your notes. Use the Individual Reflection worksheet to summarize your notes.

You will use the Individual Reflection sheet to introduce your partner to another pair in the next part of today's discussion.

Individual Reflection

Purpose: To think about what was learned during the partner discussion and get ready to introduce each other in small groups.

What part of your partner's story captured your attention, and why?

As you listened to your partner's story what is at the heart of effective and meaningful services? In other words, what made the service experience excellent?

What are the most important words or phrases you heard that describe services when they are at their best?

ACAP
"Our Program at its Best"
Critical Success Factors

Purpose: To identify the criteria – the key words, phrases and characteristics – that describe ACAP when it is at its best.

Self Management Responsibilities:

- Reports due at _____
- Identify leadership roles: Discussion Leader, Reporter, Recorder, Timekeeper, Data Manager
- Use the chart paper to capture your ideas as you brainstorm the questions below.

Task 1:
In a go-around, introduce your partner by sharing highlights from your interview. (Use your reflection sheet as a guide.)

Task 2:
As a group, use the questions below to guide your discussion:

- What can the story you heard teach us about what adults look for in a service program like ACAP?

- What words or themes did you hear that capture the description of ACAP when it is at its best?

- If you imagine ACAP in five years meeting the greatest success, what words would you use to describe it?

Task 3:
As a group, **select the top five words or phrases** that you think are the most important descriptions that should be used to capture what ACAP is and what it looks like at its best.

Write one word/phrase on each sheet of 8" by 14'' paper.

Post those on the wall. If you see other words or phrases from other groups that seem similar, post them together.

Adult Community Autism Program (ACAP)
Logo Design Meeting: August 21, 2010

Purpose: To identify the criteria that will be used to design an ACAP logo (with implications for marketing and communication in general)

Perspectives Represented: Bureau of Autism Services Administrative, Program & Clinical Staff; Keystone Autism Services Administrative, Program, Clinical, & Direct Service Staff; ACAP Founding Members; Keystone Human Services Marketing; ACAP Program Participants

Words posted to wall and voted on to prioritize:
It was noted that voting did not rule out the other values; it just helped us prioritize the "must-haves." The number in () indicates the number of votes the description received.

Growth (7)

Collaboration/integration (7)

Self-discovery (6)

Independence (5)

Person-driven (4)

Effective/evidence-based (3)

Hope (3)

Respect (3)

Fun/opportunities (2)

Opportunity (2)

Responsive (2)

Putting skills into action (1)

Choice (1) – possibly tied to person-driven

Realization of Dreams (0)

Self-reliant (0)

Self-awareness (0)

Relationships (0)

Becoming (0)

Two other words posted: **VALUES** and **ACAP**. The group decided that the words above <u>are</u> the values, and that they provide the foundation ACAP is built upon.

Additional words captured throughout the day:

Adults

Unique

Strength

Excitement

Supported Independence (potential tag line)

Help overcome barriers

First of its kind/new/innovative

Noteworthy

Thrilled

Accessible

Faith

Freedom

Commitment to quality

Community

Friendship

Listen

Makes sense

Creative

What the family wants

Balance

Powerful

Active/not bored: Encouragement

Whole-person support

More than one method

Adult Community Autism Program (ACAP)
Logo Design Meeting: August 21, 2010

Our Program at its Best: Meeting Participant Quotes

"Getting to know people in my community is cool." – ACAP participant

"This has given me something to do. I was bored, and now I have guys to hang out with." - participant

"I have learned more about myself." – ACAP participant

"It was so neat when I got around people from other disabilities and realized that even though I was different I have abilities." – ACAP participant

"I was excited about the opportunity to help someone gain more independence and a better quality of life." – KAS direct service professional

"I wanted to make a difference for people, and ACAP lets me do that every day." – BAS operational staff

"ACAP is based on best practices and outcomes that we can measure. We can be sure the services and supports we are providing are really working for the person." – BAS clinician

"We were able to design this program from scratch so that it really worked for the people we wanted to support. That was exciting to be a part of." – KAS clinician, founding member

Adult Community Autism Program (ACAP)
Logo Design Meeting: August 21, 2010

<u>Resulting Logo</u>

Tag Line: Supported Independence

APPENDIX C

Staff In-Service Pre-Survey

Development of a New Staff Orientation Program

During the first day of the BAS staff in-service we will consider the criteria that should be used in the development of a New Staff Orientation program. The objective of the New Staff Orientation program is to facilitate the transition of new employees into our organization, through tools and resources that enable the employee to become a productive, contributing member of our team. Consideration of different organizational, autism-specific, and job-specific components will help ensure the program is as effective as possible.

Assessment Purpose: Evaluating the Program's Effectiveness

To ensure that the orientation is meeting both individual and organizational needs, we have established an evaluation process to provide data for measuring the effectiveness of the program. Because this orientation is being designed with the input received during the in-service, your perspective before and after the development of the program is invaluable.

Confidentiality

The perspective and feedback you share will be kept confidential and will only be used to identify general themes that will help guide future efforts.

Please return the completed survey to Erica prior to the in-service. Email is preferred, or you can turn in a hard copy prior to the start of Tuesday's agenda. Thank you in advance for your careful consideration.

Development of a New Staff Orientation Program

Section I. For each statement below, please select the rating that best describes your experience with training as a new staff member to BAS.

1. I have been an employee with BAS for:

Less than 6 months	6 months to 1 year	1–2 years	2 -3 years	3 -4 years	Founding member (5 or more yrs)

2. Indicate the amount of <u>autism-specific</u> training you have received since you have been an employee of BAS.

No Training	Little Training	Some Training	Much Training	Great Amount of Training

3. Indicate the amount of <u>organization-specific</u> training you have received since you have been an employee of BAS.

No Training	Little Training	Some Training	Much Training	Great Amount of Training

4. Indicate the amount of <u>role-specific</u> training you have received since you have been an employee of BAS.

No Training	Little Training	Some Training	Much Training	Great Amount of Training

Section II. For each statement below, please select the rating that best describes your experience with and understanding of individuals with autism.

1. Prior to starting at BAS, rate the amount of your <u>personal</u> experience with individuals with Autism Spectrum Disorders (ASD).

No Experience	Little Experience	Some Experience	Much Experience	Great Amount of Experience

2. Prior to starting at BAS, rate the amount of your <u>professional</u> experience with individuals with Autism Spectrum Disorders (ASD).

No Experience	Little Experience	Some Experience	Much Experience	Great Amount of Experience

3. Rate your current level of understanding of the needs of individuals with Autism Spectrum Disorders (ASD).

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

Section III. One goal of an employee orientation is to help new staff members gain a systemic understanding of the organization. This includes its history, structure, mission, vision and values. There is also additional information new staff members need to know in order to perform their individual jobs well. **For each statement below, please select the rating that best indicates how much understanding you currently have of each area.**

1. The history of how BAS was formed

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

2. Where BAS fits into the larger governmental organizational chart

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

3. Where my role fits into the BAS organizational chart

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

4. What the organizational mission is

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

5. What the organizational values are

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

6. How the work I do is tied to the organizational mission

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

7. How the work I do is tied into the organizational values

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

8. Who to go to or where to look for resources when I have questions about autism

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

9. Who to go to or where to look for resources when I have questions about the organization

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

10. Who to go to or where to look for resources when I have questions about my specific role/work tasks

Very Little Understanding	Little Understanding	Some Understanding	Good Understanding	Very Good Understanding

Section IV. Please provide a brief answer to the question below.

What would you list as the three most important things a new employee for BAS needs to know to be successful in his/her role?

BAS Staff In-Service Post-Survey

Survey Overview

IN-SERVICE OBJECTIVE

During the BAS staff in-service, we discussed the organization's history, mission and values, and considered the criteria that should be used in the development of a New Staff Orientation program. The objective of the New Staff Orientation program is to facilitate the transition of new employees into our organization, through tools and resources that enable the employee to become a productive, contributing member of our team. Consideration of different organizational, autism-specific, and job-specific components will help ensure the program is as effective as possible.

ASSESSMENT PURPOSE: EVALUATING THE PROGRAM'S EFFECTIVENESS

To ensure that the in-service and resulting orientation program meet both individual and organizational needs, we have established an evaluation process to provide data for measuring the effectiveness of the in-service in meeting its objectives. Your perspective is invaluable.

CONFIDENTIALITY

The perspective and feedback you share will be kept confidential and will only be used to identify general themes that will help guide future efforts.

BAS Staff In-Service Post-Survey

Section I: BAS Training Experience

For each statement below, please select the rating that best describes your experience with training as a BAS staff member.

I have been an employee with BAS for:

○ Less than 6 months

○ 6 months to 1 year

○ 1-2 years

○ 2-3 years

○ 3-4 years

○ Founding member (5 or more years)

Indicate the amount of AUTISM-SPECIFIC training you have received since you have been an employee of BAS.

○ No Training

○ Little Training

○ Some Training

○ Much Training

○ Great Amount of Training

Indicate the amount of ORGANIZATION-SPECIFIC training you have received since you have been an employee of BAS.

○ No Training

○ Little Training

○ Some Training

○ Much Training

○ Great Amount of Training

BAS Staff In-Service Post-Survey

Indicate the amount of ROLE-SPECIFIC training you have received since you have been an employee of BAS.

- ◯ No Training
- ◯ Little Training
- ◯ Some Training
- ◯ Much Training
- ◯ Great Amount of Training

BAS Staff In-Service Post-Survey

Section II: Autism Experience

For each statement below, please select the rating that best describes your experience with and understanding of individuals with autism.

Rate your current level of understanding of the needs of individuals with Autism Spectrum Disorders (ASD).

◯ Very Little Understanding

◯ Little Understanding

◯ Some Understanding

◯ Good Understanding

◯ Very Good Understanding

My understanding of the needs of individuals with Autism Spectrum Disorders (ASD) has increased as a result of the in-service.

◯ Not at All

◯ Increased Very Little

◯ Some Increase

◯ Moderately Increased

◯ Greatly Increased

BAS Staff In-Service Post-Survey

Section III: Organizational Understanding

For each statement below, please select the rating that best indicates how much understanding you currently have of each area.

The history of how BAS was formed

○ Very Little Understanding

○ Little Understanding

○ Some Understanding

○ Good Understanding

○ Very Good Understanding

Where BAS fits into the larger governmental organizational chart

○ Very Little Understanding

○ Little Understanding

○ Some Understanding

○ Good Understanding

○ Very Good Understanding

Where my role fits into the BAS organizational chart

○ Very Little Understanding

○ Little Understanding

○ Some Understanding

○ Good Understanding

○ Very Good Understanding

Section III: Organizational Understanding (continued)

What the organizational mission is

○ Very Little Understanding

○ Little Understanding

○ Some Understanding

○ Good Understanding

○ Very Good Understanding

How the work I do is tied to the organizational mission

○ Very Little Understanding

○ Little Understanding

○ Some Understanding

○ Good Understanding

○ Very Good Understanding

What the organizational values are

○ Very Little Understanding

○ Little Understanding

○ Some Understanding

○ Good Understanding

○ Very Good Understanding

How the work I do is tied to the organizational values

○ Very Little Understanding

○ Little Understanding

○ Some Understanding

○ Good Understanding

○ Very Good Understanding

BAS Staff In-Service Post-Survey

What the organizational vision is

( ) Very Little Understanding

( ) Little Understanding

( ) Some Understanding

( ) Good Understanding

( ) Very Good Understanding

How the work I do is tied to the organizational vision

( ) Very Little Understanding

( ) Little Understanding

( ) Some Understanding

( ) Good Understanding

( ) Very Good Understanding

Section III: Organizational Understanding (continued)

Who to go to or where to look for resources when I have questions about AUTISM

- ( ) Very Little Understanding
- ( ) Little Understanding
- ( ) Some Understanding
- ( ) Good Understanding
- ( ) Very Good Understanding

Who to go to or where to look for resources when I have questions about THE ORGANIZATION

- ( ) Very Little Understanding
- ( ) Little Understanding
- ( ) Some Understanding
- ( ) Good Understanding
- ( ) Very Good Understanding

Who to go to or where to look for resources when I have questions about MY SPECIFIC ROLE/WORK TASKS

- ( ) Very Little Understanding
- ( ) Little Understanding
- ( ) Some Understanding
- ( ) Good Understanding
- ( ) Very Good Understanding

BAS Staff In-Service Post-Survey

Section IV: In-Service Effectiveness

Please provide a brief rating or answer to each question below.

One objective of the staff in-service was to develop a shared understanding of the organizational values that guide our work. How effective was the in-service in meeting this objective?

◯ Highly Ineffective

◯ Somewhat Ineffective

◯ Effective

◯ Somewhat Effective

◯ Highly Effective

One objective of the staff in-service was to develop a shared understanding of the organizational vision. How effective was the in-service in meeting this objective?

◯ Highly Ineffective

◯ Somewhat Ineffective

◯ Effective

◯ Somewhat Effective

◯ Highly Effective

One objective of the staff in-service was to create a personal connection to our work through a shared understanding of the impact our organization has on others. How effective was the in-service in meeting this objective?

◯ Highly Ineffective

◯ Somewhat Ineffective

◯ Effective

◯ Somewhat Effective

◯ Highly Effective

BAS Staff In-Service Post-Survey

One objective of the staff in-service was to identify the criteria that will help us design a New Staff Orientation program that will facilitate the transition of new employees into our organization, through tools and resources that enable the employee to become a productive, contributing member of our team. How effective was the in-service in meeting this objective?

○ Highly Ineffective

○ Somewhat Ineffective

○ Effective

○ Somewhat Effective

○ Highly Effective

BAS Staff In-Service Post-Survey

Section IV: In-Service Effectiveness (continued)

Based on your ratings of the previous questions, what would you have added, changed, or improved about the in-service to better meet the objectives?

What impact did the staff in-service have on the way you carry out your day-to-day work? For example, consider how you carry out tasks within your role or the organization, your interactions with others, etc. Please be specific.

PLEASE ADD ANY FINAL THOUGHTS ABOUT THE STAFF IN-SERVICE THAT YOU'D LIKE TO SHARE.

Appendix C3 LSM II Data Collection Summary Corresponding to Table 8-1

Data Sets B1/F1	% of Respondents	Understanding of Values
B1	86.2	good or very good
	13.2	little or some
	48.3	good, majority
F1	88.5	good or very good
	11.5	little or some
	50.0	good, majority
B1/F1	0	very little
Data Sets B2/F2	**% of Respondents**	**Understanding of How Work Ties to Values**
B2	86.2	good or very good
	13.8	little or some
	51.7	good, majority
F2	76.9	good or very good
	23.0	little or some
	50.0	good, majority
B2/F2	0	very little
Data Set K1	**% of Respondents**	**Effectiveness of LGS: Shared Understanding of Values Guiding Work**
K1	88.4	effective to highly effective
	65.3	somewhat ineffective to effective
	53.8	effective, majority
	0	ineffective

Appendix C3 LSM II Data Collection Summary Corresponding to Table 8-1 (continued)

Data Sets B3/F3	% of Respondents	Understanding of Mission
B3	93.1	good or very good
	6.9	little or some
	58.6	good, majority
F3	92.3	good or very good
	7.7	little
	61.5	good, majority
B3/F3	0	very little
Data Sets B4/F4	% of Respondents	Understanding of How Work Ties to Mission
B4	86.2	good or very good
	13.8	little or some
	55.17	good, majority
F4	73.1	good or very good
	26.9	little or some
	46.2	good, majority
B4/F4	0	very little
Data Set K1	% of Respondents	Effectiveness of LGS: Shared Understanding of Values Guiding Work
K1	88.4	effective to highly effective
	65.3	somewhat ineffective to effective
	0	ineffective
	53.8	effective, majority

Appendix C4 LSM II Data Collection Summary Corresponding to Table 8-2

Data Set F5	% of Respondents	Understanding of Vision
F5	88.5	good or very good
	11.5	some
	0	little or none
	57.7	good, majority

Data Set F6	% of Respondents	Understanding of How Work Ties to Vision
F6	69.2	good or very good
	30.7	little or some
	0	very little
	42.3	good, majority

Data Set K2	% of Respondents	Effectiveness of LGS: Shared Understanding of Vision
K2	88.5	effective to highly effective
	57.7	somewhat ineffective to effective
	46.2	effective, majority
	0	highly ineffective

Appendix C5 LSM II Data Collection Summary Corresponding to Table 8-5

In between the time that responses were collected on the pre-survey to the post-survey, 50% percent of the people who were in the category of "less than six months" at the time of the pre-survey moved to the category of "6-12 months" on the post-survey. Therefore, in order to maintain the validity of the findings when comparing the pre-survey data to the post-survey data, it was necessary to combine the two subgroups into one category. This subgroup is referred to as "up to one year" or "0-1 year" in the data summary.

Length of Employment/Understanding of Values
Pre   employees rating less than a good understanding ranged from 0-1 year employment Post   employees rating less than a good understanding ranged from 0-3 years employment
Pre   100% of employees of one or more years rated their understanding as good or very good Post   only 100% of employees of 1-2 years or 5+ years rated their understanding as good or very good
Pre employees of up to one year rated their understanding from little to very good, with 50% as good Post employees of up to one year rated their understanding from some to very good, with 78% as good
Pre   100% of employees of 1-2 years rated their understanding as good Post   80% of employees of 1-2 years rated their understanding as good; 20% as very good
Pre   62.5% of employees of 2-3 years rated their understanding as very good Post   66.7% of employees of 2-3 years rated their understanding as very good
Pre   80% of employees of 3-4 years rated their understanding as good Post   75% of employees of 3-4 years rated their understanding as good or very good, with 50% as very good
Pre/Post   100% of founding members (5+) years rated their understanding as very good
Length of Employment/Understanding of How Work Ties to Values
Pre   employees rating less than a good understanding ranged from 0-5+ years employment Post employees rating less than a good understanding ranged from 0-4 years employment
Pre employees of up to one year rated their understanding from little to very good, with 60% as good Post employees of up to one year rated their understanding from some to very good, with the 67% as good
Pre   100% of employees of 1-2 years rated their understanding as good Post   80% of employees of 1-2 years rated their understanding as good; 20% as very good
Pre approximately 50% of employees of 2-3 years rated their understanding as good, and 50% as very good Post 33% of employees of 2-3 years rated their understanding as good, and 50% as very good
Pre 80% of employees of 3-4 years rated their understanding as good, and 20% as very good Post 50% of employees of 3-4 years rated their understanding as good, 25% as very good, and 25% as little
Pre/Post   100% of founding members (5+) years rated their understanding as very good
Pre/Post more than 90% of people, regardless of length of employment, indicated at least some understanding

Appendix C5 LSM II Data Collection Summary Corresponding to Table 8-5 (continued)

Length of Employment/Understanding of Mission
Pre   employees rating less than a good understanding ranged from 0-1 years employment Post   employees rating less than a good understanding ranged from 0-3 years employment
Pre   employees of up to one year rated their understanding from little to very good, with 60% as good Post   employees of up to one year rated their understanding from little to very good, with 78% as good
Pre   100% of employees of one or more years rated their understanding as good or very good Post   100% of employees in the subgroups of 1-2 years or 5+ years rated their understanding as good or very good
Pre   100% of employees of 1-2 years rated their understanding as good Post   100% of employees of 1-2 years rated their understanding as good
Pre   62.5% of employees of 2-3 years rated their understanding as good, and 37.5% as very good Post   50% of employees of 2-3 years rated their understanding as very good, and 33.3% as good
Pre   80% of employees of 3-4 years rated their understanding as good, and 20% as very good Post   50% of employees of 3-4 years rated their understanding as good, and 50% as very good
Pre/Post 100% of founding members (5+) years rated their understanding as very good
Length of Employment/Understanding of How Work Ties to Mission
Pre   employees rating less than a good understanding ranged from 0-5+ years employment Post   employees rating less than a good understanding ranged from 0-4 years employment
Pre   employees of up to one year rated their understanding from little to very good, with 50% as good Post   employees of up to one year rated their understanding from some to very good, with 66.7% as good
Pre   100% of employees of 1-2 years rated their understanding as good Post   80% of employees of 1-2 years rated their understanding as good; 20% as very good
Pre   50% of employees of 2-3 years rated their understanding as very good, and 37.5% as good Post   50% of employees of 2-3 years rated their understanding as 33.3% as good
Pre   80% of employees of 3-4 years rated their understanding as good Post   50% of employees of 3-4 years rated their understanding as very good, and 50% as some or little
Pre/Post   100% of founding members (5+) years rated their understanding as very good

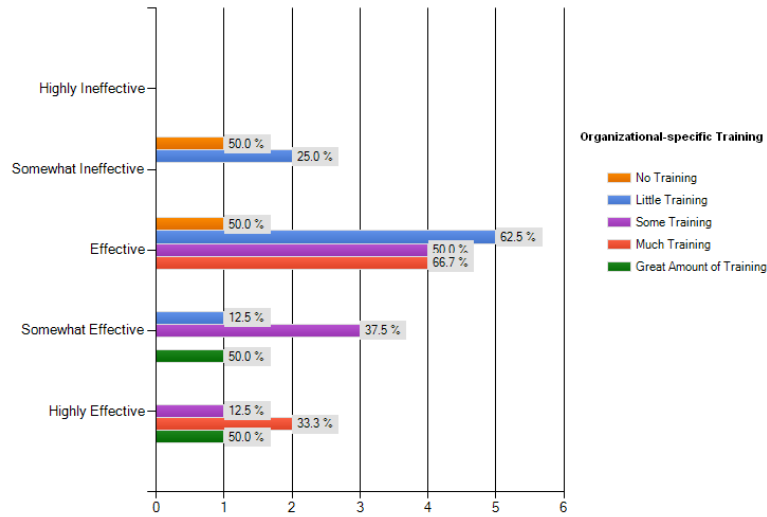Appendix C6 LSM II Data Collection Summary Corresponding to Table 8-6

Length of Employment/Understanding of Vision
employees rating less than a good understanding ranged from 0-3 years employment
employees of up to one year rated their understanding from some to very good, with 78% as good
80% of employees of 1-2 years rated their understanding as good
83% of employees of 2-3 years rated their understanding as good or very good
100% of employees of 3-4 years rated their understanding as good or very good, with 50% of the subgroup in each category
100% of founding members (5+) years rated their understanding as very good
Length of Employment/Understanding of How Work Ties to Vision
employees rating less than a good understanding ranged from 0-4 years employment
employees of up to one year rated their understanding from some to very good, with 78% as good
60% of employees of 1-2 years rated their understanding as good
83% employees of 2-3 years rated their understanding as good or very good
employees of 3-4 years rated their understanding as little to very good , with 25% of the subgroup in each of the four categories
100% of founding members (5+) years rated their understanding as very good

Appendix C7

One objective of the staff in-service was to develop a shared understanding of the organizational values that guide our work. How effective was the in-service in meeting this objective?

One objective of the staff in-service was to develop a shared understanding of the organizational vision. How effective was the in-service in meeting this objective?

One objective of the staff in-service was to create a personal connection to our work through a shared understanding of the impact our organization has on others. How effective was the in-service in meeting this objective?

Appendix C7

What the organizational values are

Organizational-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Little Understanding — 12.5 %

Some Understanding — 50.0 %, 12.5 %

Good Understanding — 50.0 %, 50.0 %, 50.0 %, 50.0 %, 50.0 %

Very Good Understanding — 25.0 %, 50.0 %, 50.0 %, 50.0 %

How the work I do is tied to the organizational values

Organizational-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Little Understanding — 12.5 %

Some Understanding — 50.0 %, 37.5 %, 12.5 %

Good Understanding — 50.0 %, 37.5 %, 50.0 %, 66.7 %, 50.0 %

Very Good Understanding — 12.5 %, 37.5 %, 33.3 %, 50.0 %

What the organizational mission is

Organizational-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Little Understanding — 50.0 %, 12.5 %

Good Understanding — 50.0 %, 62.5 %, 87.5 %, 50.0 %

Very Good Understanding — 25.0 %, 12.5 %, 50.0 %, 100.0 %

How the work I do is tied to the organizational mission

Organizational-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Little Understanding — 25.0 %

Some Understanding — 50.0 %, 37.5 %, 16.7 %

Good Understanding — 50.0 %, 87.5 %, 50.0 %, 50.0 %

Very Good Understanding — 37.5 %, 12.5 %, 33.3 %, 50.0 %

Appendix C7

What the organizational vision is

Organizational-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Very Little Understanding

Little Understanding

Some Understanding
- 12.5 %
- 12.5 %
- 16.7 %

Good Understanding
- 100.0 %
- 62.5 %
- 62.5 %
- 33.3 %
- 50.0 %

Very Good Understanding
- 25.0 %
- 25.0 %
- 50.0 %
- 50.0 %

How the work I do is tied to the organizational vision

Organizational-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Very Little Understanding

Little Understanding
- 12.5 %

Some Understanding
- 50.0 %
- 12.5 %
- 33.3 %

Good Understanding
- 100.0 %
- 25.0 %
- 62.5 %
- 16.7 %
- 50.0 %

Very Good Understanding
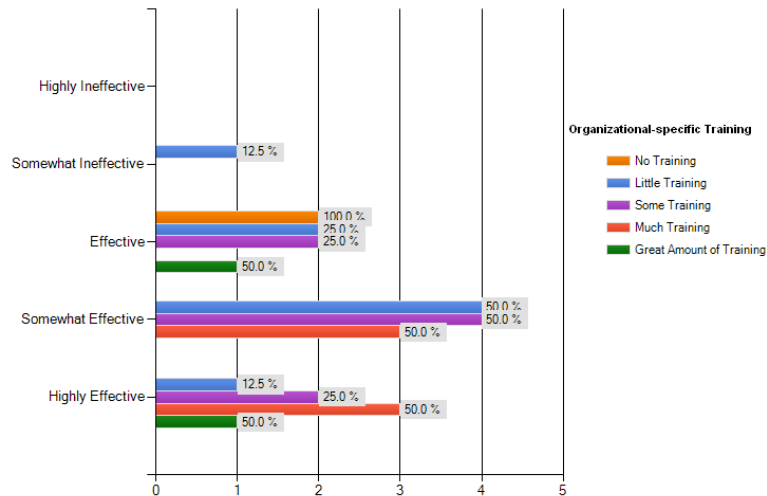- 12.5 %
- 25.0 %
- 50.0 %
- 50.0 %

Appendix C8

One objective of the staff in-service was to develop a shared understanding of the organizational values that guide our work. How effective was the in-service in meeting this objective?
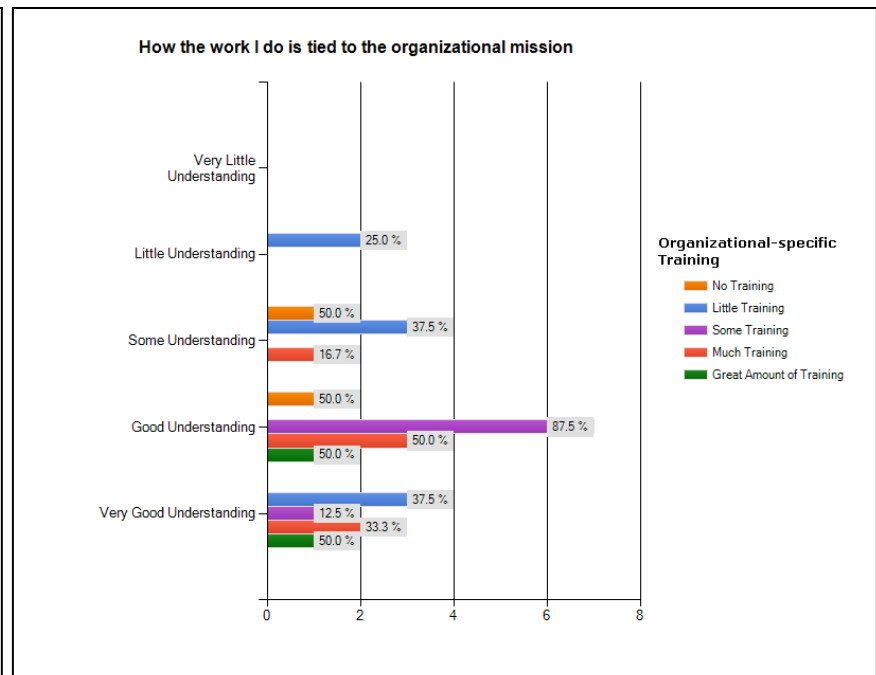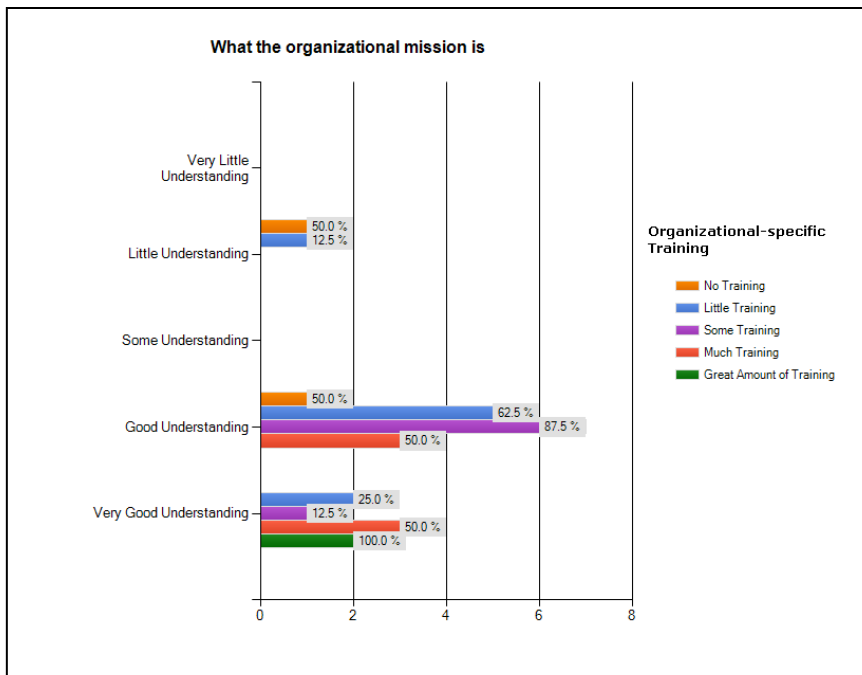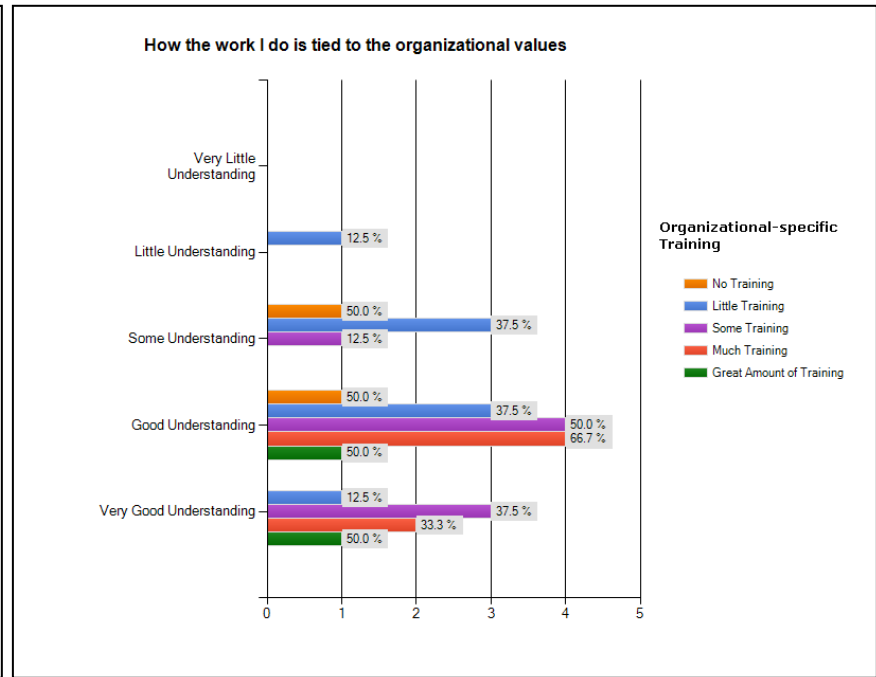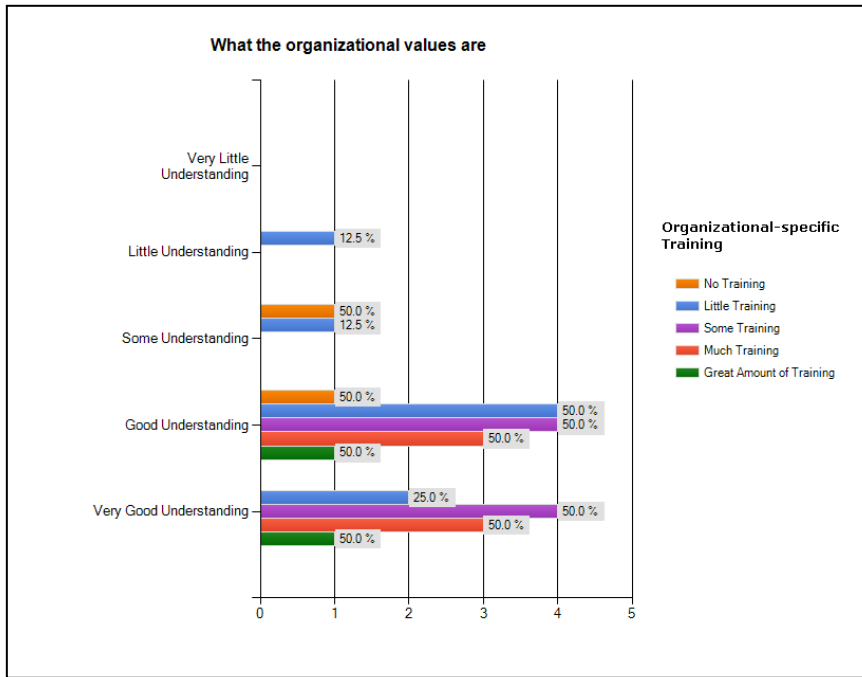

One objective of the staff in-service was to develop a shared understanding of the organizational vision. How effective was the in-service in meeting this objective?
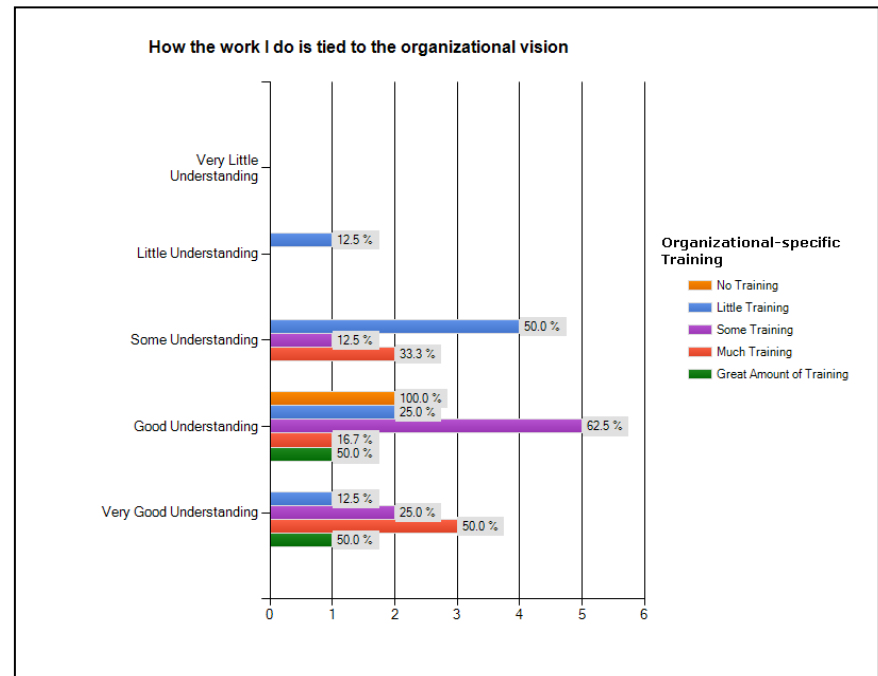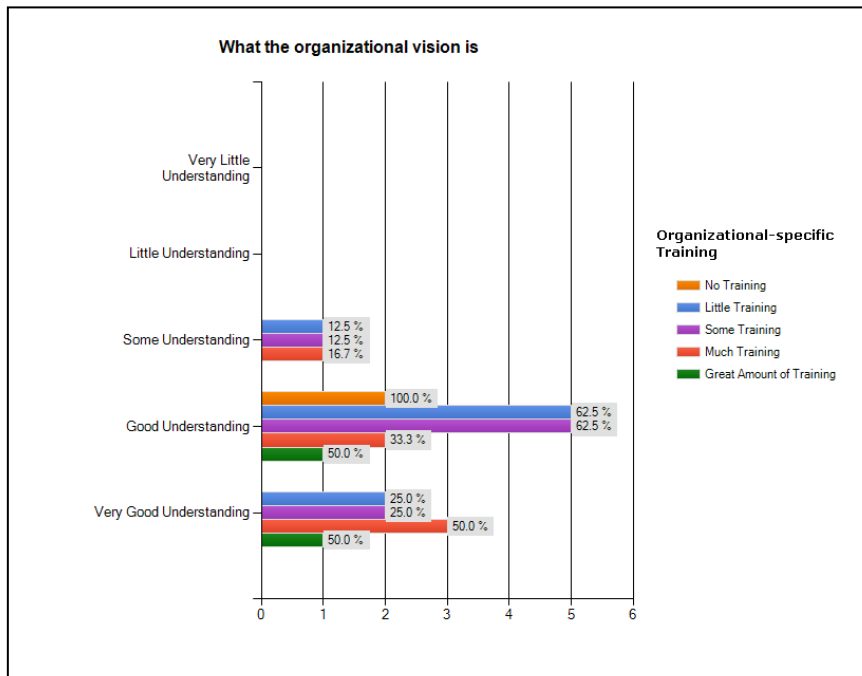

One objective of the staff in-service was to create a personal connection to our work through a shared understanding of the impact our organization has on others. How effective was the in-service in meeting this objective?

Appendix C8

What the organizational values are

Role-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Very Little Understanding

Little Understanding — 9.1 %

Some Understanding — 33.3 %, 9.1 %

Good Understanding — 33.3 %, 45.5 %, 55.6 %, 100.0 %

Very Good Understanding — 33.3 %, 36.4 %, 44.4 %, 100.0 %

How the work I do is tied to the organizational values

Role-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Very Little Understanding

Little Understanding — 9.1 %

Some Understanding — 33.3 %, 36.4 %

Good Understanding — 33.3 %, 36.4 %, 66.7 %, 100.0 %

Very Good Understanding — 33.3 %, 18.2 %, 33.3 %, 100.0 %

What the organizational mission is

Role-Specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Very Little Understanding

Little Understanding — 33.3 %, 9.1 %

Some Understanding

Good Understanding — 33.3 %, 63.6 %, 55.6 %, 100.0 %, 100.0 %

Very Good Understanding — 33.3 %, 27.3 %, 44.4 %

How the work I do is tied to the organizational mission

Role-Specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Very Little Understanding

Little Understanding — 18.2 %

Some Understanding — 33.3 %, 27.3 %, 11.1 %

Good Understanding — 33.3 %, 27.3 %, 55.6 %, 100.0 %, 100.0 %

Very Good Understanding — 33.3 %, 27.3 %, 33.3 %

Appendix C8

What the organizational vision is

Role-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Some Understanding: 18.2 %, 50.0 %
Good Understanding: 66.7 %, 54.5 %, 55.6 %, 50.0 %, 100.0 %
Very Good Understanding: 33.3 %, 27.3 %, 44.4 %

How the work I do is tied to the organizational vision

Role-specific Training
- No Training
- Little Training
- Some Training
- Much Training
- Great Amount of Training

Little Understanding: 9.1 %
Some Understanding: 45.5 %, 11.1 %, 50.0 %
Good Understanding: 66.7 %, 27.3 %, 44.4 %, 50.0 %, 100.0 %
Very Good Understanding: 33.3 %, 18.2 %, 44.4 %

SurveyMonkey

	Response Count
Based on your ratings of the previous questions, what would you have added, changed, or improved about the in-service to better meet the objectives?	
	26
answered question	26
skipped question	0

1. Based on your ratings of the previous questions, what would you have added,

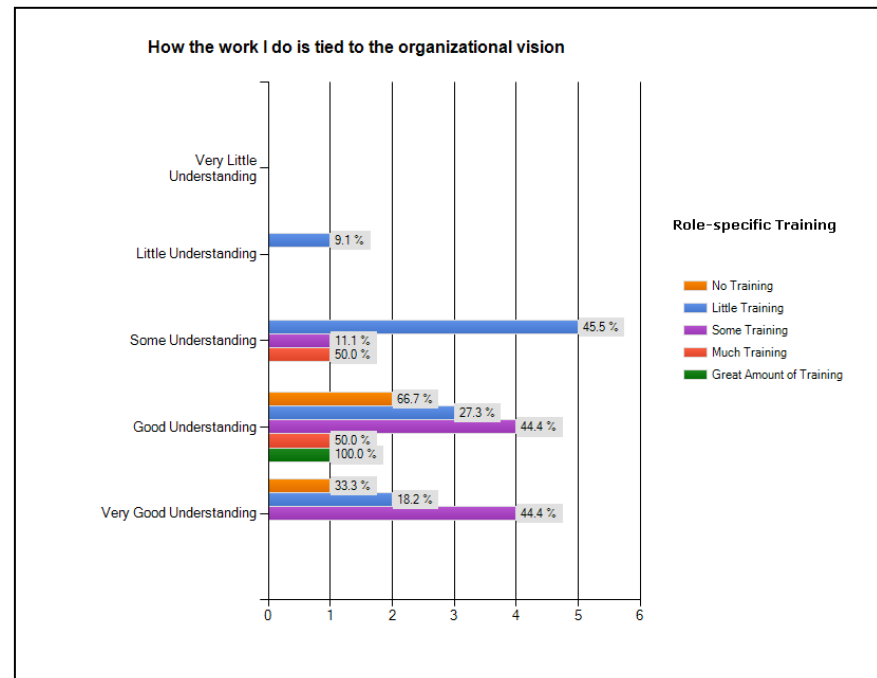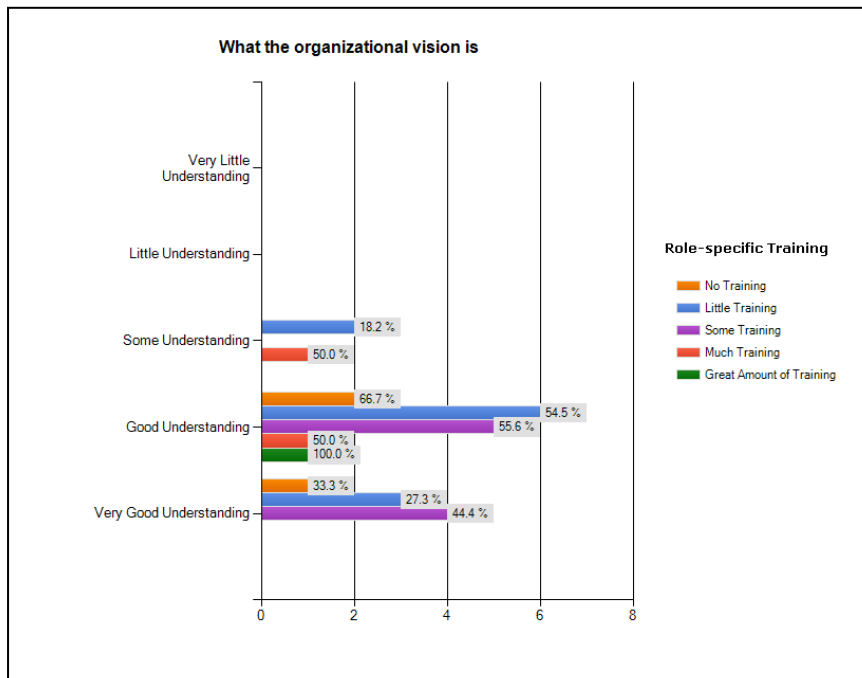|	Response Text	
1	1. I wish we had taken the opportunity to describe to each other more completely our roles in the organization. 2. I was hoping for a more in-depth discussion of the history of the organization.	Oct 28, 2010 4:14 PM
2	Name tags we need to have more large group discussions on policy & procedures with each region getting time to share. an outside facilitator would be great.	Nov 3, 2010 2:05 PM
3	More time spent on discussion of issues pertaining to the waiver and HCSIS issues.	Nov 3, 2010 2:47 PM
4	I think it needed to be more focused on the objectives of BAS and the roles of each program	Nov 3, 2010 3:16 PM
5	More time allotted for the regional offices to discuss problematic issues as a group.	Nov 3, 2010 3:18 PM
6	I think the in-service did a good job of allowing everyone to share their understanding of the BAS mission/vision/values, etc but I would have then liked to see/hear Nina/Pia say "X,Y,Z are the values we want to bear in mind while working at BAS because ____"	Nov 3, 2010 3:19 PM
7	none	Nov 3, 2010 3:19 PM
8	I wouldn't change anything. I enjoyed the format and thought it was highly effective.	Nov 3, 2010 3:46 PM
9	been very, very specific on where those charts on the wall at the end fit into the big picture. still do not see where that is going.	Nov 3, 2010 4:39 PM
10	I still believe that some staff members lack a comprehensive knowledge of autism and it's impact on individuals' lives and the lives of their family members.	Nov 3, 2010 6:19 PM
11	none	Nov 3, 2010 6:47 PM
12	The morning exercise on Day 1 was not productive The all staff waiver meeting needed more time for further discussion	Nov 3, 2010 7:17 PM
13	I am not sure that everyone came away with an understanding of what each person's role is within BAS. This is a significant hinderance on a daily basis.	Nov 3, 2010 7:43 PM
14	day two did not seem to be very productive as moving towards the Bureau's goals/understanding... The guests in the afternoon were great but the morning was broken out into groups and it was not very productive.	Nov 3, 2010 7:51 PM

1. Based on your ratings of the previous questions, what would you have added,

	Response Text	
15	The activity where we moved from table to table to reflect on different possiblities for the employee orientation didn't really work for me.	Nov 3, 2010 7:53 PM
16	I didn't find the outside facilitator to be overly effective.	Nov 4, 2010 1:09 AM
17	Day 1 was good, but I would have liked a clear explanation was to where the data collected was heading, and what the results were. I did enjoy interacting with different staff members that I don't normally get to. Day 2 was very excellent, but the sector meeting could have been longer, and more organized.	Nov 4, 2010 1:21 PM
18	I would have liked to see (and hear) a breakdown of the specific roles in BAS (e.g. who does what in waiver or ACAP, what clinical does, what the training people do, who helps to coordinate trainings, etc...).	Nov 4, 2010 1:34 PM
19	The connection of the in-service to the stated goal of New Staff Orientation development was too tenuous. It begged the question, "why are we doing this?" Several people said they really appreciated the opportunity to hold the waiver staff meeting in person with the whole group, and wished it had been longer. That came as a surprise to me, but food for thought for next time. ACAP staff obviously wouldn't have that same need.	Nov 4, 2010 5:55 PM
20	Discuss trainings that current employees would like. I understand that the two day was for new employees but it is frustating to think that when we were new employees we received no training.	Nov 5, 2010 2:07 PM
21	The group activities could have been more focused on the objectives of the in service. They seemed to focus mainly on developing staff training for new staff but did very little to add to the knowledge of existingstaff members.	Nov 5, 2010 2:19 PM
22	I would have provided job specific details in a workflow chart.	Nov 8, 2010 2:29 PM
23	More information about current issues, our budget and our future.	Nov 8, 2010 6:07 PM
24	Perhaps specific descriptions of the services we provide and how they can complement one another. Maybe a case review explaining why certain services were chosen for a certain individual. Also, the appropriate number of hour for services based on the individual's needs.	Nov 10, 2010 3:50 PM
25	Added time for the regions to exchange information.	Nov 17, 2010 7:41 PM
26	More focus on actual roles so we know what everyone is doing would have been helpful. I also would have included additional staff members in the planning sessions so maybe next time if at all possible. A social networking event would have also helped us connect in a less formal way.	Nov 18, 2010 8:48 PM

	Response Count
What impact did the staff in-service have on the way you carry out your day-to-day work? For example, consider how you carry out tasks within your role or the organization, your interactions with others, etc. Please be specific.	
	26
answered question	26
skipped question	0

2. What impact did the staff in-service have on the way you carry out your day-

	Response Text	
1	Being able to meet everyone in person, and work with at least some of the people I did not already know, helps smooth day-to-day interactions. Also, it was invigorating to discuss the ideals and values that formed BAS.	Oct 28, 2010 4:14 PM
2	it helped me understand who to contact more often. would like more specifics on job duties of each person	Nov 3, 2010 2:05 PM
3	no impact, always professional and share information.	Nov 3, 2010 2:47 PM
4	I don't think it made a difference to my everyday operations it wasn't helpful in that aspect	Nov 3, 2010 3:16 PM
5	Correspondence with other regional office staff has increased due to making a personal connection with people at the in-service. Even during staff calls, it has become easier to make a connection and interact with people now that I've met everyone.	Nov 3, 2010 3:18 PM
6	No impact on my daily work	Nov 3, 2010 3:19 PM
7	none	Nov 3, 2010 3:19 PM
8	The in service made me aware of the very concerns I have others within BAS also have. This was reassuring that I was not on an island by myself. I also gained a greater appreciation for the diversity of gifts, talents, backgrounds of others who make up BAS. Knowing more in-depth what other staff connections, background and interest are can help me use them as resources if needed.	Nov 3, 2010 3:46 PM
9	none	Nov 3, 2010 4:39 PM
10	No impact.	Nov 3, 2010 6:19 PM
11	none	Nov 3, 2010 6:47 PM
12	No impact on my day-to-day work; but it was wonderful learning the history of the BAS	Nov 3, 2010 7:17 PM
13	Minimal to no impact on my day to day work; however, it is always a good opportunity to actually be face to face with others from BAS.	Nov 3, 2010 7:43 PM
14	it didnt	Nov 3, 2010 7:51 PM
15	I now know reps from other offices better.	Nov 3, 2010 7:53 PM
16	No changes in how I carry out tasks within my role.	Nov 4, 2010 1:09 AM

2. What impact did the staff in-service have on the way you carry out your day-

	Response Text	
17	Nina's speech on the founding of BAS, was very touching and encouraged me to follow the BAS mission with more passion. I also enjoyed the consumer speeches. This made me remember what my job is all about.	Nov 4, 2010 1:21 PM
18	Not much changed from before the in-service to after the in-service. My values, work ethic, and motivation to do my job has always been there and clearly match that of BAS. I just wish those folks who do not share the same vision and values move on to a different department. I think they are the people who hold BAS back, even if only a little.	Nov 4, 2010 1:34 PM
19	None.	Nov 4, 2010 5:55 PM
20	i enjoyed meeting our participants. They gave me motivation at work.	Nov 5, 2010 2:07 PM
21	Having particians in our programs come in and speak to us, to me was the most effective part of the in-service.	Nov 5, 2010 2:19 PM
22	none	Nov 8, 2010 2:29 PM
23	It was helpful to see everybody face-to-face and share comments, concerns, ideas etc.	Nov 8, 2010 6:07 PM
24	It didn't really focus on our day to day work, so I don't know how to answer this.	Nov 10, 2010 3:50 PM
25	Moderately impacted my day to day work.	Nov 17, 2010 7:41 PM
26	I've started to consider how what I'm working on every day ties into the values Nina shared (actually, that would be something that would be really helpful to do together during the next in-service or in-person meeting). The in-service also helped me get to know people I don't normally get a chance to talk to, and learn something fun about them.	Nov 18, 2010 8:48 PM

PLEASE ADD ANY FINAL THOUGHTS ABOUT THE STAFF IN-SERVICE THAT YOU'D LIKE TO SHARE.	
	Response Count
	19
answered question	19
skipped question	7

3. PLEASE ADD ANY FINAL THOUGHTS ABOUT THE STAFF IN-SERVICE THAT

	Response Text	
1	It was very helpful to meet the program participants.	Oct 28, 2010 4:14 PM
2	I think that it would have been more effective to have the group discussion without upper management present and managing the meeting. Staff could have had a round table discussion of problems related to the job and drafted a list of questions/concerns to management for responses. If you want honest questions and discussions, it is always more productive to have those who do the job, ask the questions that concern them and not have management direct the discussion. People may not say what is on their mind when the meeting is micro-managed.	Nov 3, 2010 2:47 PM
3	I usually hate "ice-breakers"; however, in my opinion, the group activities were a creative and effective was in reaching the objectives of the in-service.	Nov 3, 2010 3:18 PM
4	I enjoyed the ability to meet people from the other offices and the activities.	Nov 3, 2010 3:19 PM
5	Although I believe the in-service was highly effective, I heard some complaining from other staff who felt is was a waste of time and regret it was a mandatory event. There is still some division among staff and I'm not sure how to dispel the division.	Nov 3, 2010 3:46 PM
6	none	Nov 3, 2010 6:47 PM
7	Truly enjoyed meeting the individuals receiving BAS services. 1 day would have been sufficient for the training with the elimination of facilitated interactions	Nov 3, 2010 7:17 PM
8	none at this time.	Nov 3, 2010 7:51 PM
9	It was effective in bringing people from the three regional offices together to share face to face in meetings. The panel was great. The Powerpoint that ran before the panel was awkward (too long and no sound). If the goal was to bring us together to make us feel more like a team, I think it was effective and needed. The goal of coming up with an employee orientation could possibly have been accomplished more effectively with a smaller group and a survey and seemed more like an activity just to give us something to do. Asking for ideas from the staff prior to the in-service and/or sharing the goals in advance might have made people feel more invested in the outcomes. Overall, it was a good experience and I look forward to seeing a concrete outcome in terms of a real employee orientation, which is very much needed.	Nov 3, 2010 7:53 PM
10	The opportunity to hear from the participants/families regarding how BAS services are impacting their lives was very moving!	Nov 4, 2010 1:09 AM
11	Excellent overall job!	Nov 4, 2010 1:21 PM

3. PLEASE ADD ANY FINAL THOUGHTS ABOUT THE STAFF IN-SERVICE THAT

	Response Text	
12	Nothing more at this time.	Nov 4, 2010 1:34 PM
13	The "so what?" has to be clearer, with activities cross-walked to that more explicitly. If it is to be a team-building exercise, people will recognize that pretty quickly and question why it was described as having some other purpose.	Nov 4, 2010 5:55 PM
14	We need more training. Not for just new employees but for the current ones.	Nov 5, 2010 2:07 PM
15	I may have had better answeres if this survey would have come out much closer to the in-service date. The information is no longer fresh in my mind at this point.	Nov 5, 2010 2:19 PM
16	I think we should meet face to face more often.	Nov 8, 2010 2:29 PM
17	There should be quarterly face-to-face meetings among Waiver staff and more face-to-face trainings specifically related to our job.	Nov 8, 2010 6:07 PM
18	Erica always does a great job in organizing things.	Nov 10, 2010 3:50 PM
19	Great job overall - it was clear that a lot of effort was made to get us talking together. Plus ending the two days with the panel really gave things a positive feel.	Nov 18, 2010 8:48 PM

Case Listening Tool

Client: Bureau of Autism Services, PA Department of Public Welfare

Staff In-Service/New Staff Orientation Design
- *Large Group Meeting (LGM) Staff In-service dates: Sept. 21-22, 2010*
- *10 am – 4 pm, Mechanicsburg, PA*
- *Scope:* Mandatory Bureau-wide Training In-Service for 38 Internal Stakeholders
- *Primary Task/Tangible Purpose:* Identification of the criteria that will be used in the development of a New Staff Orientation program
- *Indirect Purpose:* Create some cohesion and shared understanding amongst fractured segments of the organization
- *Tie to thesis:* To measure the efficacy of Large Group Design principles in transmitting the organizational vision and values to the internal stakeholders and in having the stakeholders add their own perspectives in ways that result in their joining with and owning the vision and values

In-Service Structure

- Design of a New Staff Orientation to be completed as the primary component of a two-day mandatory staff in-service. An initial draft of this component has been developed by E. Wexler, BAS staff. This section of the staff in-service will be refined, planned and facilitated by the meeting consultant in collaboration with BAS staff using the Large Group Design principles.
- Additional draft/proposed components of the full two-day agenda have been identified. The consultant will work with a Planning Committee comprised of BAS staff members to identify, prioritize and finalize additional components and meeting priorities of the staff in-service training agenda.
- The agenda developed by the steering committee with the facilitating consultant may identify an additional meeting component that requires full staff participation and external facilitation.
- Draft components of full agenda and the draft LGM Staff Orientation design to be provided to professional consultant for consideration and recommendations; starting point for working with a steering committee comprised of BAS internal stakeholders

<u>Core Issue</u>
The organization is rapidly expanding and at the same time staff members are beginning to leave. At this point, the only staff orientation in existence is an out-of-date binder that was put together three years ago. As the staff has evolved, there has been no consistency in the training requirements provided. Instead, they often walk into their jobs and are provided a hodgepodge of tasks or materials to review by their supervisor and are left on their own to learn about the autism community, the organization and their role within it. There is general agreement that a sustainable, consistent yet flexible new staff training/orientation process that incorporates Bureau-wide, job-specific, and autism-specific requirements needs to be developed.

Description of the System:
The Bureau of Autism Services (BAS) is a governmental organization in its fifth year of existence. Our Bureau and the programs we are designing are truly innovative. As the only state agency in the country created to administer programs specifically designed to support adults with autism, we provide a blueprint not only for Pennsylvania but for the nation at large.

For the first three years our staff remained small, operating with part-time hourly contractors and two to three salaried staff members. Each of the four founding leaders and the subsequent five employees brought into the system had a personal connection to autism. Because we were such a small organization, engagement around our vision and the methods of achieving it was part of our day-to-day practice. We had the characteristics of a start-up communal organization, with close ties outside of the office, a small number of goals (including survival), and a strong sense of solidarity around the clear, collective benefits of success. (Goffee & Jones 1996) As a result of these combined circumstances, the vision our Director had was easily transmitted and a shared set of values and sense of mission developed fairly naturally.

Over the past two years, however, BAS has grown from a team of five centrally located individuals to a staff of 38 spread out around the state and some staff members who were part of the initial implementation stage have left. Our staff now consists of both salaried and hourly contractors, and others are state employees. The background experiences, frameworks, and values they bring with them are very different in nature. This has created new communication challenges and some internal tensions. We don't fully fit the cultural profile of a mercenary organization with an absence of strong personal ties or that of a fragmented organization with no solidarity around our goals (Goffee & Jones 1996); however, we also no longer function as a communal organization either.

 It is not our goal to recreate or sustain the high levels of sociability and solidarity that we started with; that would be unrealistic given our geographic logistics, staffing composition, and governmental structure. However, if we are to maintain our impact as the organization evolves over time, it is important that we identify effective communication strategies to develop a shared understanding and generational enculturation of organizational values and vision.

<u>Directional Coherence</u>
- It is critical our staff begins to work together if our system is going to survive the upcoming transition in state leadership.
- The services we are providing are vital and need to be designed and implemented with care and purposeful consideration.
- An updated and comprehensive new staff orientation is sorely needed.
- We are a new organization that needs to change our approach/procedures as we learn more about the population we are supporting and the environment we are supporting them in.

Fragmentation

- The staff is a blend of state employees, clinicians and contractors, resulting in different and often opposing mindsets and perspectives as to how we should be operating and what staff needs to know to perform their roles.
- The tension between staff members is getting in the way of the work getting done. With so many differing perspectives and experiences, it is incredibly challenging to get people on the same page about what needs to be done and how to do it.
- Decisions about what training staff needs is decided within limited parameters and does not consider the whole system as decisions are made.

Contextual Coherence

Mixed. In December we brought the staff together for an in-service (30 at the time). We asked why everyone chose to work in the Bureau. Almost everyone noted they wanted to be part of the history of something new and innovative and important, as well as part of a system that encourages personal development. They wanted to be able to influence change. Some staff members have left and we have 10+ new employees with more to come who were not part of that discussion.

Relational Coherence

Most staff members believe there is value in having different perspectives in this process. However, there is a lot of micromanaging and protectiveness around the initial processes we've been using up to this point. As new staff members are provided with supervisory capacities, there is push-back from the staff who has been part of the process development from early on. This is especially true when contractors are coming in without an understanding of the state system's hierarchical structure and have equal or higher authority as the state supervisors.

Additionally, we have two different adult programs based on the same principles with some overlapping clinical support. The operational staff has comparable roles but no day-to-day interactions. The two programs basically operate as separate and unrelated initiatives although a number of steps have been taken over the past 9 months to develop consistent outreach wording and communication channels. Combined with this, there is also a small number of staff that do not work directly with either program but whose projects overlap at times with those program offices.

All three sectors of the staff (state, clinical, contractor) need to connect in order to experience their interrelationships around maintaining our core values regardless of the specific operating procedures that will naturally evolve and change over time.

For a staff orientation to be meaningful, it needs to meet the larger Bureau needs/context and the needs of the individual program teams the staff member will be working on.

Results

If the issue is successfully addressed, we will have created a new staff orientation that captures the organizational vision and values of the current staff; provides organizational and autism-specific context; and provides tools and training needed for staff members to

successfully fill their roles. Regardless of the prior experiences and mindsets new staff members bring, there will be shared context to work from.

<u>Task Coherence</u>
We need to bring everyone together in person but there must be a clear purpose. Overtly addressing team building skills or interpersonal issues would not work, but must be a side product of any plan.

Time	Length	Who	Flow Element	Activity	Logistics/Materials
DAY 1 10-12 Beginning	2 hour	Whole Group Pairs	**Introductions** *Whole System Aware Inclusion Discovery Active Engagement Self-Management*	Part I:Welcome from Director Part II: Round Room Intros a. Name b. Program/Office c. Role within Program Part III: Quadrant Activity a. What brought you to this work; Why BAS b. What work priorities having trouble setting aside for two days c. Describe a skill/talent/resource rarely called for at work/interesting for folks to know d. Hopes for two-day in-service Part IV: Groups pull themes from quadrants/post themes/report out	HISTORY: HAVE TABLES WITH NUMEROUS HISTORICAL DOCS AND PHOTOS IN ROOM AS PEOPLE ENTER Intro Questions posted on chart in advance AI worksheet for interviews Charts on Walls/Markers & Post-Its on Tables 8" by 14" paper
12-12:30 Beginning	.5 hours	Director Whole Group	**Organizational History** *Whole System Aware Shared Context*	Director shares BAS history Q&A	Charts on walls closest to main door
12:30-1:30			**Organizational History** *Whole System Aware Inclusion*	LUNCH During Lunch: Timeframe you joined BAS (history timeline as they walk in/out – put your name/post-it where it fits on the posted timeline indicating when you joined	HISTORY: SLIDE SHOW OF STAFF PHOTOS AND EVENTS OVER THE YEARS
1:30-2:30 Beginning	2 -3 hours	Pairs to Mixed Groups	**Purpose** *Clarity of Purpose Ground Rules Whole System Aware Shared Context Active Engagement Self-Management*	Our Org at its Best: AI Interviews Part I: Partner Interviews a. BAS experience that is example of org "working well" b. Moment of personal alignment with BAS mission/values	Purpose posted on chart in advance, on in-service agenda Activity Guidelines AI Interview handouts

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				c. Culture: what characterizes BAS at its best (Highlight key words/quotes, etc.) Part II: Partners share with groups a. highlight themes/things that resonate with group b. Post themes	8" by 14" paper
2:30-4:00 Middle	1.5 hours	Mixed Groups to Whole Group	**World Café** *Clarity of Purpose* *Whole System Aware* *Active Engagement* *Discovery* *Self-Management* *Common Ground*	FRAMING: Identify criteria that will be used to design a new staff orientation training ~ Not designing the specific content of the orientation today ~ Criteria identified will be used to design the structure of the orientation ~ Smaller cross-sector group of BAS staff representing the different perspectives will identify the actual components that need to be included based on this criteria ~ Larger staff will then have an opportunity to review, modify, fine-tune, evaluate effectiveness Larger implications: themes identified about what we want in the staff orientation will impact our understanding of the core values that we want to retain as the organization evolves World Café Six Tables a. Personal Touch b. Core Values/Org Character c. Orientation to the Field d. Orientation to the Org e. Orientation to the Job f. Orientation Methods Table Discussions: 10 min/table, 3 tables Comment on other tables	Table Tents with Six Categories Charts covering tables Markers/masking tape on tables Criteria Identification Worksheets • Overview of each category • Task Purpose, Guidelines, Procedure • Table Discussion Guidelines • Synthesizing Criteria Guidelines

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Time		Who	Flow Element	Activity	Logistics/Materials

Middle		Mixed Group to Whole Group	**World Café (cont)**
			
			Clarity of Purpose
			Whole System Aware
			Active Engagement
			Discovery
			Self-Management
			Common Ground
			Focus on the Future
				Synthesizing Criteria and Qualities
				  a. Original tables discuss and synthesize contributions
				  b. Record top 5-6 criteria, record, post with table topic as heading
				  c. Report out
				
				Tools or resources identified during interactions recorded on separate paper for each table – one person collect and turn in
				
				VOTE: between end of Day 1 and Beginning of Day 2
				~ put stickers by top priorities for an new staff orientation
				~ voting doesn't eliminate the other characteristics, but will narrow down to the "must haves" as starting point for next steps
					Worksheet: Critical Success Factors
					
					Charts with lists
					
					8" by 14" paper
					Markers
					
					Criteria Identification Worksheets
					• Overview of each category
					• Task Purpose, Guidelines, Procedure
					• Table Discussion Guidelines
					• Synthesizing Criteria Guidelines
					
					Circle Stickers (half sheet per person)

DAY 2 10-10:15 Middle	15 minutes (possible 30 depending on staff interest)	Director Whole Group	*Whole System Aware* *Focus on the Future*	Director shares thoughts on Day 1 Describes organizational values & BAS vision/interactions with staff	none
Middle		Like	**Program Teams**	Teams meet to discuss/work on program-specific	none

10:15-noon		groups		objectives; Erica meets with afternoon panelists	
12-1				LUNCH Panel presenters/program participants informally have lunch with staff	BAS IMPACT: SLIDE SHOW ~STAFF PHOTOS, QUOTES FROM TRAINING, GRANTS, PROGRAM PARTICIPANTCS, ETC – INLCLUDE ALL DEPARTMENTS AND SAMPLE INITIATIVES OVER THE YEARS
1:00-3:00 C	2 hours		**Personal Connections** *Focus on the Future* *Common Ground*	PANEL: ACAP/Waiver Program Participants, Family Members, Support Staff a. What was life like before the BAS program b. What is life like now with the BAS program/services – describe impact c. What are your hopes for yourself/your family member/client in the future	
3:00 C	5-10 min		**Director**	CLOSING REMARKS Reflections & Hopes for the Future	

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BAS Staff In-Service

September 21-22, 2010
Mechanicsburg, PA

AGENDA

Day 1: Tuesday, September 21, 2010

Purpose: To link the past, present and future of BAS to identifying criteria for effective staff orientation

9 am – 10 am   Continental Breakfast

10 am – 12:30 pm   * Welcoming Remarks
                            * Introductions
                            * Connecting on Multiple Levels
                            * BAS History: Nina Wall-Coté

12:30 pm – 1:30 pm   Lunch

1:30 pm – 4:00 pm   * BAS at its Best
                            * Criterion Development for a New
                                Staff Orientation program

Facilitator: Lonnie Weiss

Breakfast, lunch, and an afternoon snack will be provided.

BAS Staff In-Service

September 21-22, 2010
Mechanicsburg, PA

AGENDA

Day 2: Wednesday, September 22, 2010

Purpose: To connect to our work by highlighting the impact of BAS programs and initiatives

9 am – 10 am   Continental Breakfast

10 am – 10:15 am   Housekeeping: Whole Staff

10:15 am – 12:00 pm   Small team/individual meetings

12:00 pm – 1:00 pm   Lunch
We are pleased to welcome our afternoon presenters for lunch.

1:00 pm – 3:00 pm   Panel Session
Program participants, family members and support staff will join us to share their personal stories and accomplishments.

3:00 pm   Closing Remarks: Nina Wall-Coté

Breakfast, lunch, and an afternoon snack will be provided.

Introductions: Creating Connections Part 1

Purpose: To create connections to the purpose of the in-service and to each other

Procedure:
- Each person takes one sheet of paper from a flip chart.
- Put your name at the top of the chart.
- Divide the sheet into four quadrants.

Next Steps:
- Pair up with one other person in the room and take one minute to interview the person around the question in **Quadrant 1**. Write your interviewee's response in Quadrant 1 on *their* flipchart. Then switch roles for the second minute.

- Pair up with a second person in the room and follow the same procedure for **Quadrant 2**.

- Pair up with a third person in the room and follow the same procedure for **Quadrant 3**.

- Pair up with a fourth person in the room and follow the same procedure for **Quadrant 4**.

- Post your flipchart sheet on the wall.

NAME

Quadrant 1 What brought you to this work? Why did you choose to join the BAS staff?	**Quadrant 2** What work priorities are you having a little trouble putting aside, in order to be here for two days?
Quadrant 3 Describe a skill, talent or resource you possess that is rarely or never called for at work, but might be interesting for BAS folks to know.	**Quadrant 4** What do you hope comes out of our two days together?

Introductions: Creating Connections Part 2

Purpose: To create connections to the purpose of the in-service and to each other

Identifying Themes
- Small groups, each assigned one quadrant

Procedure:
- With your small group, take a walk around the room and look for themes across your assigned quadrant.
- Work together to…
  - ❖ Summarize the themes you identify.
  - ❖ List the themes on 1 sheet of chart paper.
  - ❖ Select / get a volunteer to report themes to the group.
- You have <u>10 minutes</u> to complete this activity.

After the small group activity:
- Come back to the large group.
- Post your theme sheet where indicated.
- One person from each group will report the themes identified.

Our Organization at its Best

Purpose: To discover the forces and factors that give our organization its success and vitality when it is at its best

Guidelines:

1. Select a partner you don't usually work with. If you know everyone at your table well, try to find a partner from a different table.

2. Talk to your partner using the guiding questions on the next page. Each pair will have 20 minutes to work together.

3. Encourage your partner to tell his or her own story; draw him or her out with your positive energy and curiosity.

4. Listen carefully to your partner. You will share the highlights of your partner's story in the next part of today's discussion. Take good notes and listen for **great quotes** and **key words** in his/her story. Jot down notes while you're listening, and note highlights at the end of their 10 minutes.

5. The information and themes you collect from these questions will be used to help us shape the criteria that should be used to design a staff orientation program.

Complete your interviews by _____.

Our Organization at its Best

Purpose: To discover the forces and factors that give our organization its success and vitality when it is at its best

1. Tell me about an experience you've had working at BAS that is an example of this organization "working well." It could be something big (like securing major funding, implementing a major initiative, or helping a participant or provider through the enrollment process). Or it could be something very small (like two staff members quickly and easily reaching a good decision, or someone speaking kindly to you when you were having a hard day). Who was involved? What made it so memorable?

2. Think of a time when you had a moment of feeling completely aligned with the organization. The mission of the organization and your personal values were in perfect harmony. What was happening? What vision or values were in synch then?

3. Every organization has a unique overarching culture, and every organization has especially wonderful aspects of its culture that really shine. What characterizes the Bureau at its best? What is at the heart of BAS and makes it innovative, positive and vital?

NOTES: Highlights, key words, great quotes, details that resonate about BAS at its best….

Our Organization at its Best

Purpose: To discover the forces and factors that give our organization its success and vitality when it is at its best

Group Task Guidelines:

1. Circle the group, each person briefly sharing a couple of highlights each from your partners' responses.

2. Listen for themes shared by several people, and for compelling highlights that capture something that resonates with the group.

3. On one sheet of chart paper, record the shared themes and strong highlights that describe BAS at its best.

4. Post your themes.

You have until _____ to complete this group work.

New Staff Orientation Program: Criteria Identification

The Personal Touch: Think of a person who was particularly helpful to you when you started. What did they do, or say, or provide? What was it about what they did that was so helpful?

Core Values / Organizational Character: What do you understand about why this agency came into being and its core values? What do incoming staff need to know about BAS's reason for being?

Orientation to the Field: What tools and information did you receive or already have that helped you in working with the autism community/programs for adults with autism? What tools and information did you lack about autism that created challenges?

Orientation to the Organization: What tools and information did you receive or already have that eased your entry into this organization? What tools and information did you lack that created challenges?

Orientation to the Job: What tools and information did you receive or already have that eased your entry into your particular job? What tools and information did you lack that created challenges?

Orientation Methods: What are important considerations in the design of an orientation program that will help incoming staff get oriented to the autism community, the agency, and their job? Consider timing, format, sequencing, access, tracking, location and other ideas for how to deliver orientation effectively.

New Staff Orientation Program Design

Purpose: To identify the criteria for an effective New Staff Orientation program, including the qualities, characteristics, and key descriptors of an effective orientation design

Guidelines:
  ❖ Our focus today is on the qualities and characteristics of an effective orientation program. As you work on this, you may also think of specific tools and resources to include in an orientation program. Keep track of these ideas on a separate piece of paper. We will not discuss these specifics today, but your ideas will be collected at the end of the day for use in developing the program.

Procedure:

  • Each table is set for discussion on 1 of 6 topics, various aspects of an effective orientation program for BAS.

  • There will be 3 rounds of small group work for 10 minutes each.

  • Everyone will begin by addressing the topic at the table where they are seated. After 10 minutes, you can choose and move to another topic (or stay for more time on your current topic.)

  • Each person will be able to contribute on up to 3 topics.

  • Group size is limited to 7 people per table topic.

  • At the end of 30 minutes, there will be a 5 minute opportunity to visit other tables and add to the work on those topics.

  • After these rounds of conversation we will synthesize the input on the topics and bring it back to the whole group.

New Staff Orientation Program Design

Table Discussion Guidelines:

1. Focus on the table topic and what matters to you about it.

2. Contribute your thinking, listen to understand others.

3. Write, doodle and draw key ideas on the paper-covered table. It's OK to play!

4. Have these functions filled:
   a. Be sure everyone has a chance to contribute
   b. Be sure ideas are sketched / written down
   c. Track time – 10 minutes

5. At the end of the 10 minute round, select a "Host" who will stay at the table for the next round and briefly share the main ideas, themes and questions of the initial conversation. Everyone else chooses another topic / table.

In 2nd and 3rd Round Discussions:

1. Follow the guidelines for participation, as above.

2. Start with the Host's brief update of the previous conversation on this topic.

3. Link and connect ideas from previous table conversations.

In the Free Five Minutes:

Walk around, read the table topics you're particularly interested in, and comment in writing on those conversations.

New Staff Orientation Program Design

Synthesizing Criteria and Qualities – Guidelines:

1. Return to your original table.

2. Read everything written about the topic. Discuss and synthesize the contributions.

3. Extract 5 to 7 criteria, regarding this topic, for an effective New Staff Orientation program. Include qualities, characteristics, and key descriptors of an effective orientation design.

4. Record the criteria on one chart page. Title the page with your table topic.

5. On a separate page, collect any specific tools and resources suggested for inclusion in an orientation program (or mark these on the tablecloth/paper, using a unique color or outline.)

6. Select / get a volunteer to briefly report the criteria.

- Complete this task by _____.

APPENDIX D

Appendix D   Large-Scale Intervention Research Timeline

	Spring-June 2010	July 2010	Aug 2010	Sept 2010	Oct 2010 - Feb 2011
ACAP Logo Design LSM I	March: ACAP Communication Strategy developed	7/6 Internal ACAP marketing meeting 7/13 Initial planning meeting w/ ED & ACAP program manager 7/20 SC planning call	8/4 SC meeting 8/12 ED planning call 8/19 SC planning call **8/24: Large Scale Meeting** 8/30 ACAP POST-SURVEY INTERVIEWS 8/31 ED, criteria review/ initial logo design meeting	9/3 POST-SURVEY DISSEMINATED 9/14 POST-SURVEY DEADLINE 9/14 SC/program participant meeting: review logo designs developed by ED 9/22 ED submits revised logo designs; ACAP participant presents project overview to organization during staff in-service LSM	Bi-monthly planning meetings with ED continue November: New ACAP Program Manager begins February: Final ACAP Logo Design approved
Staff In-Service LSM II	May: • In-Service scheduled • LGD draft developed June: • In-Service rescheduled • Internal Planning Calls	7/6: Internal planning meeting with Director	(Original LSM Date: 8/4-8/5) 8/17 Initial planning call w/EC 8/19 EC planning call 8/23 Internal planning w/ Exec Staff 8/26 Planning call w/ EC 8/27 - EC meets with Director/Assistant Director	9/10 EC contract approved 9/7-9/19 Revised LGD developed 9/15 EC planning meeting 9/15 PRE-SURVEY DISSEMINATED 9/20 PRE-SURVEY DEADLINE **9/21-9/22: Large Scale Meeting** 9/27 EC summary meeting	10/25 POST-SURVEY DISSEMINATED 11/1 POST-SURVEY DEADLINE Nov - Jan In-Service Summary Report Development; Monthly Staff Call Updates

KEY
Note: The internal consultant, who was also the action researcher, participated in all meetings and planning calls indicated above.
SC: Steering Committee   **ED**: External Designer, ACAP Logo Design   **EC**: External Consultant, Staff In-Service