Healthy Conversations
Connecting you with care

Results from Lessons Learned Workshop
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Introduction

The Healthy Conversations Design Team members participated in a workshop on March 31, 2010 to reflect on the lessons they learned from their project experience. The workshop was facilitated by Jennifer Shepherd of Advivum Inc.

This report addendum was prepared as part of our commitment to help others learn from this project experience. It includes: the workshop objectives, the facilitator’s detailed agenda, the pre-work assignment, snapshots of the workshop experience, and written outputs from participants’ preparatory work and from workshop conversations.

The written outputs have been combined into one section titled “Lessons Learned”. The ideas in this section have been organized into categories to help the reader to notice patterns and emerging themes. With the exception of a few minor edits made for readability, the words and phrases in this section are presented verbatim to maintain the integrity of the ideas shared.

The workshop objectives were developed by the facilitator, in consultation with the lead consultant from Advivum and the contact client. The workshop design was developed by the facilitator in consultation with the lead consultant from Advivum.

Participants received the pre-work assignment by e-mail two days prior to the workshop, and participants submitted their responses to the facilitator by the morning of the workshop. They were also invited to submit any additional lessons learned to the facilitator by noon on the day following the workshop so that they may be captured in this report.

Workshop Objectives

Five participant objectives were established for the workshop as follows:

1. Deepen your personal reflection on your individual experience of the project and identify personal learnings.
2. Explore what worked well and what you're proud of with respect to various project elements.
3. Name some of the bumps or challenges that you experienced, name what the impact was for you, and apply what you know about the 5 disciplines to inquire into what can be learned from the bumps.
4. Celebrate each other and what was accomplished.
5. Bring closure to the design team's term and talk about any loose ends that may need to be tied up to close off this project.
Detailed Agenda
Wednesday, March 31, 2010 from 9:30 a.m. - 2:00 p.m.
CCAC office in the Carlingwood Mall

Participant Objectives
1. Deepen your personal reflection on your individual experience of the project and identify personal learnings.
2. Explore what worked well and what you're proud of with respect to various project elements.
3. Name some of the bumps or challenges that you experienced, name what the impact was for you, and apply what you know about the five disciplines to inquire into what can be learned from the “bumps”.
4. Celebrate each other and what was accomplished.
5. Bring closure to the design team's term and talk about any loose ends that may need to be tied up to close off this project.

Participants
Wanda, Lianne, Patrice, Julie, Cille, Tania, Joanne, Kim, Karen, Nancy, Maribeth

Supplies
- Flipchart paper and stand (Wanda and Joanne to bring these)
- Flipchart markers
- Lots of coloured markers for the journey map
- Painter’s tape
- Watch / clock
- Matches
- Sparkly candles
- Heart-shaped sticky notes
- Other coloured sticky notes
- Mural paper – pre-populated with journey way markers/milestones
- Plain 8.5x11 paper for journaling
- Prepared flipchart of session objectives
- Digital camera, tripod, memory stick, batteries
- Cake knife and server
- Pens
- Fruit, cake, drinks
<table>
<thead>
<tr>
<th>Time</th>
<th>Objective</th>
<th>What we’ll do</th>
<th>Set up</th>
</tr>
</thead>
<tbody>
<tr>
<td>0930</td>
<td>State and connect to collective intentions for the day</td>
<td>1. Review objectives, flow of the day, washrooms and exits</td>
<td>- Post flipchart of session objectives</td>
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<tr>
<td></td>
<td></td>
<td>2. Check-in: How are you entering this workshop? What are you feeling and</td>
<td>- Arrange 12 chairs in U</td>
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<tr>
<td></td>
<td></td>
<td>thinking as we begin to reflect back on our collective journey together? (JS</td>
<td>- Heart-shaped sticky notes</td>
</tr>
<tr>
<td>0950</td>
<td>Celebrate our history / project path and recall significant achievements</td>
<td>3. Hand out heart-shaped sticky notes. Invite people to use them to offer</td>
<td>- Stick wall mural on wall</td>
</tr>
<tr>
<td></td>
<td>and events</td>
<td>thanks to each other and recognize how they touched you - along the journey</td>
<td>(with journey framework started)</td>
</tr>
<tr>
<td>1010</td>
<td>Deepen personal reflection on learning – personal mastery pause moment</td>
<td>1. Dig out the homework! Get into pairs and take turns sharing the 3</td>
<td>- Sticky notes (spare ones in case people forget to bring theirs), use</td>
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<td></td>
<td></td>
<td>highlights you brought with you on sticky notes. Practice “healthy</td>
<td>star shaped stickies to add ideas as they emerge today</td>
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<td></td>
<td>conversations”. Listen actively and inquire into each other’s experience,</td>
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<td></td>
<td>offering a question for the other to think about to deepen their reflection</td>
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<td>later and</td>
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<tr>
<td>Time</td>
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<td>share an insight you get from the conversation. You have 30 minutes for this exercise. Suggest spending 5 minutes per idea (x3 ideas) for each of you, or delve deeply into only one or two of the ideas. It’s your time, your choice. Ensure you each get 15 minutes of time. 2. Post your stickies on the mural. 3. Take 5 minutes and record take-aways from this paired sharing for your own journal. 4. Take a 10-minute pair-managed break (Instructions and settle in (5), activity (30), journal (5), break (10)</td>
<td>- Set up camera for group shot</td>
</tr>
<tr>
<td>1100</td>
<td>Deepen the team’s learning about the 5 disciplines</td>
<td>1. Gallery walk – notice what you see posted here re moments of pride, bumps, and learning, and see them in relation to the journey as a whole. (5) 2. Whole-group debrief/sharing of new insights that emerged from paired sharing and from what they notice in the stickies on the wall and any patterns. Organic sharing. JS records points on flipchart. (10) 3. In circle, inquire as a team into what contributed to these moments of pride and bumps in the road. Ask participants to pick one that they want to deepen their learning about with the whole team, or just share their experience and the personal impact of the experience. Prompt if needed with questions about the project elements (coaching circles, theory to application, session roll out, materials, etc.) JS records points on flipchart. (30)</td>
<td>- Stickies to add more insights to the mural - Flipchart, Markers, Tape</td>
</tr>
<tr>
<td>1145</td>
<td>Celebrate the group</td>
<td>Take a group photo in a tableau that represents how the team feels about what they’ve achieved together (15)</td>
<td>- Camera and tripod</td>
</tr>
<tr>
<td>1200</td>
<td>Catered Lunch</td>
<td>Something hot, yummy, and special! Breaking bread together Take time to write on heart-shaped sticky notes (gratitude notes) for each other now if you wish.</td>
<td>- Matches - Candles - Cake and fresh fruit - Knife</td>
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</tbody>
</table>

Created by Champlain CCAC and out Service Provider partners, 2010
<table>
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<tr>
<td>1245</td>
<td>Next steps</td>
<td>What’s on your mind? What loose ends need to be tied up before we can tie a bow around this project and bring it to an end? JS records items on flipchart.</td>
<td>- Flipchart, Markers, Tape</td>
</tr>
<tr>
<td>1315</td>
<td>Bringing personal closure to this experience</td>
<td>Reflecting on all of your experience, and all of your learning, what elements do you commit to grow so that they are fully alive in you, in the organizations you work in and with, and in whole systems that you interface with? Pause, reflect and journal thoughts (5) Share one idea with the whole (15)</td>
<td>- Flipchart, Markers, Tape</td>
</tr>
</tbody>
</table>
| 1335  | Celebrate the people and close the group       | 1. Stand in a circle, pat each other on the back for a job well done (2)  
2. Team toast (3)                                                                                                                                                  | - Drinks  
- Glasses                       |
| 1340  | Closure to reflect on the success of the day   | 1. Team Check-out  
2. Jennifer’s thanks for opportunity to work with the group today.                                                                                                                                             |                                  |
Pre-Workshop Personal Reflection Exercise

Find a comfortable spot for reflection. Think back to when you started the project and reflect on the events you experienced and milestones you achieved along the way. What have you learned from this experience?

Take 5-10 minutes to type up your answers to the questions in this exercise. When you’ve finished:

1. Pick three ideas and/or lessons that you’d like to share with everyone at the workshop. Highlight these items in **YELLOW** in your typed file.
2. Copy these three ideas on sticky notes, writing down one idea per sticky note.
3. E-mail your completed exercise by 7:00 a.m. March 31 to Jennifer Shepherd at
4. Bring a printed copy of your exercise and your sticky notes with you to the workshop.

Mapping the Journey

Think back to your experience with each of the following project elements:
- the idea of the champion stream
- the roll out of the nine sessions
- the integration of theory into practical afternoon sessions
- the printed and electronic materials and tools
- the coaching circles
- the project team’s planning and design journey
- your sense of the whole experience

What moments stand out for you? Bring these moments to mind as you answer the questions below.

Questions

1. What worked well?
2. What are you most proud of?
3. Imagine you are speaking with someone who has a mandate to design and plan a similar project. What lessons did you learn from this experience that you would you want him or her to keep in mind?
Workshop Results

Check-in
How are you entering this workshop? What are you feeling and thinking?

- Energized!
- Scattered
- Sad (this day brings closure to the Design Team’s experience)
- Sick, thirsty, excited
- “It’s all good”, it’s landed
- Peaceful and appreciative
- Privileged to be part of this whole process
- Proud and relieved
- Proud and excited for you, sad for the end of the project
- Hopeful
- Tired, and looking forward to today to connect to the fullness of it
Mapping Our Journey Together

Members of the Design Team created a wall mural together depicting the milestones of their journey together. Each member drew a wavelength on the mural that illustrated her unique emotive experience of the shared journey. When the mural was complete, the Design Team reflected on what they noticed in the mural. Highlights of their conversation are presented below.

What is coming up for you as you look at what you’ve created here? What patterns or themes do you notice? What stands out?

- It’s messy in the beginning and middle, and there’s more white space near the end.
- The messiness comes from the process of creating a shared vision. We’re testing our own assumptions. I’m asking what assumptions I’m carrying. It would have come together faster if we’d shared these assumptions with each other up front.
- I suggest that the people who will be disseminating this work with other CCACs “go back” to this stage and test their assumptions, too, as they set up the design and implementation approach.
- The messiness came from the design work, not from the implementation.
- 95% of what “hits” comes from creativity.
- There are rumblings and there is tension in the rest of the system. Acknowledge the team leadership that is going on around us. You don’t know it until you’re in it.
- It’s a lot more than a tool. This concept is not widely held. Some have suggested that we use this tool to “fix” the other CCACs, but it’s not about fixing them all.
Lessons Learned

What worked well?

Coaching Circles

- The coaching circles (2 identical comments)
- The coaching circles were excellent. They deepened the learning, grounded me to go forward, and were very supportive, safe and open
- Having a series of coaching sessions – opportunity to observe, apply, “tweak”

Champion Stream

- Excellent process. It was beneficial to have these ambassadors within the organization to continue the journey. This was a great learning experience and it expanded personal growth that can be used in all areas of life.
- With a short turn around, it was very positive to have the professionals lead the sessions with champion support. This increased comfort and confidence for champions and provided a beneficial experience for those attending.

Session Design

- The design of the learning workshops was awesome. The exercises (F’s, frog, tree) were short and fun and were referred to in the afternoon and beyond.
- I felt that the exercises (i.e. tree, rope, frog/horse) were simple yet very effective.
- The large group learning workshops worked well.
- The integration of theory into practical afternoon sessions brought a good opportunity to use/practice learning. There was some feedback suggesting that “we were tricked” but most participants had good feedback.
- The combination of replicable, focused, large sessions and small group, emergent champion development sessions worked well.
- I was very happy to see the revisions/modifications after the first 1-3 sessions to meet participants’ needs and tailor the sessions based on the feedback.
- The continuous improvement of the series of workshops worked well.
- Go to where excitement and passion are
Design Team

Composition

- Incorporating multiple perspectives into the design team
- Participation and visibility of leadership team as part of the design and roll-out of the learning sessions
- The design team and work with the management team
- The contribution of the Champions on the design team was invaluable.
- The make up of the design team was ideal in terms of system thinking. It is proof that through healthy conversation and the tools we have learned/created, constant change and improvement is indeed possible.
- The design team represented the system.

How we worked together

- Open and honest communications among the team. I remember a moment of Personal Mastery at Carlingwood, when Wanda and Tania had a heart-to-heart that resulted in the creation of Champion coaching circles, giving breathing space to everyone (especially Annie) – GREAT!
- The team was great. Everyone knew what they were responsible for and others shared and pitched in as required to get the job done, despite the tight timelines!
- Great example of teamwork
- The team was positive, dedicated a huge amount of time, and was very committed
- “Evolving” design – incorporating feedback from earlier sessions into subsequent sessions
- Flexibility of senior leaders and the facilitation team: After the first learning workshop and we realized that the afternoon session needed redesign, everyone pulled together to make that happen!
- The project team’s planning and design journey – wow what a group – they all brought their own strengths to produce an excellent experience, especially given the very short turn around.

Roll out of sessions

- Well done, superb organization
- Scheduling of all the participants and champions – they brought exceptional skills, effort and results!

Materials

- Printed and electronic materials/tool – love the cards and posters – great reminders to focus as we go forward
- The cards and posters are fantastic!
- I feel that the cards and posters will continue to resonate with everyone.
Impact
- Participants are walking away with new perspectives and different views. Some were “blown away” with what they were exposed to. One Champion said “this was life altering”.
- Not getting sick – still be vertical
- Resilience – despite battering
- Changing lives – champions embraced and stepped up
- Emphasis on personal responsibility
- Having the champion stream idea will give us the momentum to move forward together into a future of healthy conversation.
- The transition from Design Team to Champion was a great experience and follow through.
- It’s a lot of hard work, difficult, and worth it! The outcomes are worth putting in the effort.
- The stress levels in the office are down significantly. Everybody’s trying.
- It really IS changing the way people are being.

The Excellent People!
- Champions who volunteered to participate
- Inclusion of service providers, opportunity to work within the system
- Team leader – Wanda – was competent, caring, patient, detailed and visionary. Having a fulltime project administrator
- Having additional resources (i.e. consultants)
- Senior management playing a leading role in the afternoon conversation
- Senior management’s presence
- Consultants, learning facilitators, coaching, and graphics were excellent.
- Facilitators were outstanding – amazing flow from one activity to another
- Coach – Julie – is very skilled and made a huge contribution to the Champions’ success
What are you most proud of?

- The impact this has had on the champions and how this has “changed their lives”.
- The finished product
- My personal growth
- We reached so many people in a very short period of time
- That service providers were involved and invited
- The development of the champions and the integration of hero-victim-villain, non-violent communication, five disciplines, and learning process that came together for the service provider session and champion team, thanks to all the work prior to develop each part fully on its own. This brought a depth of champions’ learning.
- The momentum that this has created – the energy, enthusiasm and motivation of the champions
- We now have a group that is poised to take these concepts to ever-widening circles of people who are also “hungry” and who recognize their desire for personal and professional growth
- The project finished successfully on time, within budget and met all the requirements of the Ministry, and everyone is healthy and still friends!
- I was resourceful, e.g. getting French translation from SOL and associates who had produced French papers and Powerpoints
- I was able to filter a lot of the “noise” and still ensure clear team communications so people knew what they needed to know to be effective. I kept emails to a minimum (e.g. production of cards/posters)
- I was calm and was a sounding board throughout the process.
- Being a part of the design team and my commitment to the process and continued learning. And, of course, never giving up on the impact conversations through email have.
- I am proud of the afternoons and how we honoured the workshop.
- I am proud I did my job well and it was appreciated by the team.
- I am proud of and putting the disciplines in practice using the experiential examples.
Words of Wisdom to Share

Imagine you are speaking with someone who has a mandate to design and plan a similar project. What lessons did you learn from this experience that you would you want him or her to keep in mind?

Set the Design Team up for success
- Clarify roles and responsibilities within the design/project team
- Ensure all have shared vision of project outcomes
- Time invested in the project team co-creating a shared vision is imperative
- Involve the professionals and utilize their expertise
- Convene an orientation for the design team itself re: learning process, creative tension, and conflict evolution to be expected in their journey
- Have more celebration of milestones along the way and map what is happening through a systems lens. (integrate into team development)
- When engaging graphic artists and other suppliers, ask how they normally work and what would be the best way for them to understand the project so they are productive and effective. Make expectations and vision clear up front. This was a very different way of working, and it was challenging and rewarding at the same time.
- Enable direct communications between the graphic artist and the printer. There are many technical issues that require direct contact to maximize effectiveness.

Get internal support and dedicated resources
- Ensure project has sufficient “visibility” within the organization
- Ensure senior management supports the initiative
- Determine if participation at the learning sessions is mandatory or voluntary (2 identical comments)
- Link the initiative with what is happening currently within the organization for the participants
- Ensure support personnel and resources have the time and the energy!
- Ensure there are dedicated resources and time commitment from them.
Senior management must play an active, encouraging and supportive role in the design.

- Increase awareness of managers early on
- Every project should have a full-time Joanne (project administrator). Have the people to make a project of this scope and scale work.
- Plan for service providers to be late adopters, expect that they will increase their attendance over the duration of the roll out.

**Design the approach to build capacity system-wide**

- Use a champion model to build internal capacity
- Plan in development of managers and champions in synch
- Clarify the role of champions so their expectations are clear.
- Encourage system partners to participate in order to build a common language and understanding
- Include development of sustainability – how to continue to grow and develop the concept, tools and strategy throughout the organization so that it becomes a “way of being”
- Understand the interdependencies between large group sessions, small group coaching, organizational design and change happening at the same time, and the management/leadership team implications and critical role of the design team.
- Recognize the power of a champion group that is “hungry” for personal and professional development to begin a “movement” within an organization. Put your focus here!
- Use champions to feed back key messages in 30 minute timeslots. Bounce ideas off of them to help us improve the key messages. View the Champions as the pulse of the organization.
- Managers need to keep connecting to integrate the work of the champions. Now is the right time for this (end of March); two weeks ago it wouldn’t have been possible.
- Notice the impact of champions being “unprepared”. There is tremendous value in their experience of questioning their mental models. Being “unprepared” helped them to NOT be heroes and be prepared to be a learner.
- Notice that in using the word “champions”, this raises expectations that the champions are experts. Recognize that whatever word you use to describe their role, the master-servant and hero-villain-victim dynamics can be so strong that they people will still be expected to be experts. Support the champions to model behaviour of being learners. The lesson here is in how to be open. Keep it at the experience and learn from the experience.
- Increased connectivity between coaching circles and learning sessions would give more support to the champions and allow for greater weaving of the material.
- Learning bites could be a part of the champion journey.
Address workshop design issues

- Bring clarity to the objectives of the learning workshops
- Communicate the objective and the content of the whole day in multiple ways so there are clear expectations and people avoid feeling “duped”
- Communicate to participants the connection between morning and afternoon sessions to feed their expectations
- Select a relevant, concrete and current example on which to practice the application of the disciplines
- Design the whole day as a whole
- When incorporating real-life project examples into the afternoon session, design this element at the same time as the morning piece so that the design of the whole day is integrated (e.g. afternoon CCAC vision and CRAAFT)
- Thoughtfully select concrete examples so that they are alive and relevant to people.
- Shorten the string exercise and bring out the linkages more. It went on longer than necessary to get the relevant points across.
- The placement of chairs in a circle was awkward for the people who had their backs to the front. Maybe use semi-circles or ask people to turn their chairs when there is a teach piece.
- I would always want to use the 6 “f”s exercise to open their minds to the possibility that there are many ways to see something and they may or may not be using the right lens to look and hear.
- The registration process could be simplified.

Develop a project plan that promotes learning

- Start early and plan well
- Listen to the feedback and modify early in the journey
- Extend the timeframe without adding to the time invested to:
  - evolve team process amongst internal and external design team members so that we apply the five disciplines (especially team learning), hero-victim-villain, and non-violent communication to ourselves
  - leverage the time between small and large group sessions and all that this process activates in the organization, to evolve the information to be shared. For example, have time to pilot some sessions, learn from the experience, and then integrate the material.
  - leverage the coaching process with champions to phase their learning from learning in and on themselves to becoming coaches for others. Start with once a week to begin and then add more time in between. Then give organizational assignments and once a month check-ins, supplemented by their learning, to coach amongst themselves for each other.
  - bring more to life through graphics
Commit to embark on a learning journey

- Being part of the design team I felt I knew a great deal but in fact I learned each and every day during the entire process. The outcomes I’ve seen while practicing have been life changing for me with my relationships with the people I work with. I have grown; my mental models of roles and people have changed, and with that knowledge positive change will and can continue to happen.
- Be gentle with yourself, be honest with your feelings and share – good things come from what is declared.
- Our journey as a design team led us through healthy conversations along each milestone. By practicing the disciplines, we created something that improved with each and every session.
- It is hard work but worth every minute of it. Practice will never make perfect but it does lead to healthy conversation and the ability to move forward in a healthy way.
- I would wish that everyone get the chance to experience something like this at least once.
- Don’t expect perfection. Live the philosophy of the learning organization and learn as you go.
- Don’t think everyone has the same shared vision. Each brings their own mental model.
- The best things happen when we trust everyone’s good intentions.
- Fertile ground, tenders/tillers/planters

Emerging Insights

What insights are emerging for you as you reflect on our conversations this morning? Where can we apply what we know about the five disciplines to deepen our learning here?

- Take time to pause and reflect with teammates. There is wisdom in the 30-minute deep dive for 30 minutes. It’s imperative to drop in with someone. Do this throughout the process to strengthen the team and to learn something new about others. Notice and appreciate the value of when you are already doing this regular check-in along the way.
- You can make time to take time to pause by: letting go of “the list”, scheduling it in, and pressing pause
- How do we apply what we’re learning to ourselves?
- Notice the gift of experiencing and seeing how things evolved and how we built capacity to evolve
- Let go of master/servant model in the organization and in ourselves.
- The organization is healing from a dark period.
- Keep practicing working with mental models, quietly, subtly.
- Make time to acknowledge and celebrate and honour along the way, not just at the end
- Explore what else we can we do. Bring in more tools and good stuff!
• Content integration came from the shared holding of space. Intend it to be so and weave the magic. Simple is coming from complex.
• Notice and acknowledge the profound impact of evolving the whole system, partners, and service providers. There is a ripple effect!
• I experienced a lot of noise during the project. It takes energy to deal with this noise. It helps to pause and ask: what am I contributing to it? Who’s making it? How can I shift the noise to music?
• You can deliver meaningful experiences to large groups!

Next Steps to Close the Project
• Package up the templates so they can be posted and shared with the Ministry. (Lianne and Wanda, by the end of April)
• Talk today to secure more resources to tie up loose ends in April and keep the momentum going. (Wanda and Patrice)
• Prepare for the June presentation.
• List the next steps and prioritize them.
• Convert the raw tape on the Learning Bites

Celebrate the Journey!