

REOS

Puriri Change Lab

April 1-3, 2008
Proceedings

Generon Reos, LLC

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Dear Participants,

This document outlines the proceedings from the Puriri Change Lab held in Auckland from April 1-3, 2008.

This document reflects the proceedings as we were best able to capture them and it is necessarily an incomplete record. Many critical discussions take place in private settings or outside of formal sessions.

We hope, however, that the following document will be useful in your ongoing work.

If you have any feedback or comments we look forward to hearing from you.

Thank you,

LeAnne Grillo and Jeff Barnum

Special thanks to Sarah Milne and Erin Mansell of Framework, who provided notes on the proceedings and the photos from which this document was produced.

May 2008

Day One

April 1, 2008



1:50pm Opening

Introduction and Welcome, Process Description, Debate

After the welcoming Powhiri and meal and an introduction and waiata, Tui Taurua Peihopa presented a baby Puriri tree that she planted with this journey began for her last November, explaining the different parts of the tree and their symbolism. Tarn Crewes shared a metaphor from the kitchen to describe the process of bringing everyone together (combining ingredients) in order to create a new whole. LeAnne Grillo and Jeff Barnum introduced themselves as facilitators. They opened with a “Cynics and Believers” debate in order to surface the viewpoints participants held about the potential of this workshop.

From the Cynics:

“We can’t forget ‘what if.’”

“All words no actions.”

“We have done this before.”

“Why do we need people from overseas – we are the people that this effects.”

“Is it going to be real or is it just going to be for managers?”

“We’ve heard it all before – there’s nothing here that I can’t get on the internet.”

“Where is the evidence for your approach?”

“Is this the best place to put our money? Should we not put it into something that is already out in there (in the community)?”

From the Believers

“Systems need to be changed – there either needs to be more involvement from consumers or there needs to be more needs being met.”

“This will be built on values and beliefs.”

“This is a unique way to look at new ideas.”

“This is trying something new with the hope and belief that it will work.”

“This workshop will create awareness and trust.”

“It is always valuable to have other peoples’ opinions (especially opposite opinions) heard so that other ideas and perspectives can be seen.”

“We hold hope for this workshop as we hold hope for the people we work with.”

“This will be a validating experience.”

Jeff then talked about the U-Process and Change Lab methodologies, because of questions regarding its efficacy, asked LeAnne to talk about another of their longstanding projects, the Sustainable Food Lab.

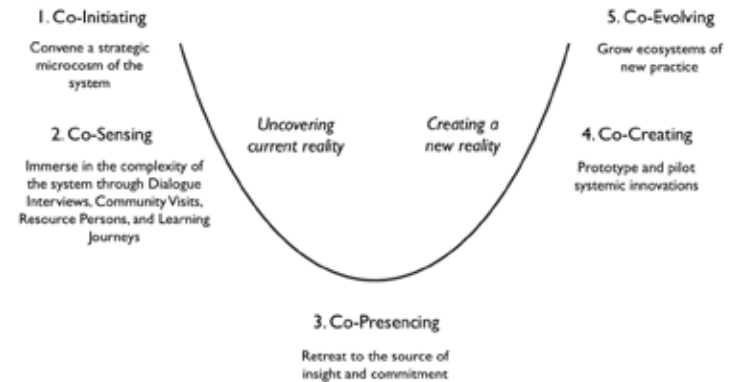
LeAnne explained that while it was a different project, the Food Lab is an inspiring example of how conflicted interests can collaborate using the U-Process approach as a framework.

Some critical points about the process are:

There are three phases: Sensing, Presencing, Creating. Sensing is being able to see the system with new eyes, and from others' points of view. Presencing is becoming present to our highest future potential as individuals and as a collective, and making personal commitments to act from a space of this potential. Creating is the working together to evolve the current reality into a way of working together that is better suited to the whole.

The Change Lab: Applying the U-Process in Complex Challenges

Source: Jaworski, Kahane, and Scharmer



Agenda Review

Tuesday

- 1 Welcome and introductions
 - Check in
 - Cynics and believers
 - Overview of methodology
 - Agenda review
 - Ground rules
- 2 Co-sensing
 - Introduction to the Studio
 - Dialogue interviews
 - Levels of perspective
- 6 Dinner
 - Close

Wednesday

- 9 Co-sensing
 - Learning journey prep
 - Depart on learning journeys
- 12 Return from journeys, debrief
- 1 Lunch
 - Synthesis
 - Co-presencing
 - Solo
 - Debrief
 - Co-creating
 - Design studio
 - Close

Thursday

- 9 Check in
 - Co-creating
 - Crystallisation
 - Design studio
 - Initiative synthesis
 - Action Plans
- 1 Close

Framing Question

The framing question at the heart of each Change Lab. It can evolve as needed, but gives everyone a focal point for structuring the rest of the co-creative process. The P Management Team, the Lab's conveners, drafted the question for this lab before beginning the workshop.

How can we capture and embody hope and unity as a richly diverse community of peers and supporters, in which a consumer governed organisation can be developed, thrive and serve?

Ground Rules

- Be Present
- Speak respectfully
- Ask questions
- There is choice here - no imposed commitment
- Make yourself comfortable

3:20pm Introduction to the Studio

Cafe tables: Death of a Matador, by Picasso

Everyone was asked to sit with the people with whom they began this journey and to whom they typically went to discuss possible forms for the new CGO. Jeff presented a short film of Picasso painting “Death of a Matador” (1957). He posed the question: We’re looking at Picasso in order to learn something about the creative process; what did you see?

Some of the comments and questions:

“He continually changed the way that he wanted to convey the idea.”

“He had a basic idea to begin with, but didn’t know what the end product was going to look like.”

“He started with the background, then the foreground, then he filled in the details.”

“We are basing our interpretation of Picasso’s painting on our emotions; actually, we don’t know what emotions he had while painting. We can only know what emotions his work stirs in us.”

“Which came first? The name of the painting, or the idea for the painting? How was the idea of the painting born? Was it there in the beginning, or did it emerge as he painted?”

Jeff played the film again, coaching participants to look at specific parts of the painting, especially the bull’s head. He called this the “sacred cow” and said that in creative work, it’s often the case that a key part of the work around which the composition is created is the very part that must be given up in order for the work to reach its full potential.

Comments after it was played the second time were:

“We have done the sketches.”

“Our organisation will go through many changes as we have seen the painting go through changes – even when it looked finished, there were a lot of changes made after that point. The work is in constant evolution.”



5:50pm Interviews and Journaling

The debrief sessions following the Introduction to the Studio focused on expanding the “Sensing” part of the Change Lab. Using the models as a starting point for understanding how the participants see themselves and the future CGO, the facilitators suggested that participants “dig down” into the background, the formative ideas, of the models, and of the ideas they embody.

This would be a process of interviewing each other in a particular way, journaling about their learning, and exploring their thoughts and core beliefs.

Dialogue Interviews

People paired up - ideally with people they didn't know so well - and interviewed each other. They were asked to suspend their judgement of what was said and encouraged to listen “alongside” their partner--to put themselves in their partner's shoes. Afterwards, they journaled:

- What did I hear?
- What did I notice about my hearing and listening?
- Were there any “ah-hah” or learning moments for me in the interview?

Given the idea that the only tool to change a system is ourselves (if we are not to act violently), participants reflected on their own experience in the effort to create a CGO, noting what particular strengths and passions are with them from their pasts as they move forward in the effort. The facilitators asked participants to reflect and write on the following question: What personal experiences have I had in the effort to create a new CGO that speak of this system's current state of hope, unity, and diversity, with reference to the framing question?

LeAnne and Jeff walked around the room answering questions of groups and individuals as they wrote, and then asked groups to share with each other: Do you see any patterns here? Are there experiences that a number of people have, and/or that seem to repeat themselves? In general, many people showed that indeed, they were seeing a broad array of common experiences in this regard.



Events, Structures, Mental Models

Jeff and LeAnne now asked the participants to think about their experiences as headlines in a newspaper. These headlines would describe “events” that for them said something significant about the state of their current system with regard to the framing question. Groups generated flipcharts of these “headlines” as shown in the accompanying images.



Going now one layer deeper into systems thinking, LeAnne and Jeff then coached the group to consider the “structures” beneath the events and experiences they had just described. Structures are policies, power dynamics, physical layouts and architectures - anything that sets the pattern for the way things get done and the way people relate to each other.

Beneath structures are mindsets or mental models. Mental models were defined as core beliefs, assumptions, cherished ideas, motives, and strongly held values at the roots of why we think and behave in particular ways. The participants explored both of these layers of their system, writing out key components of their mental models on large hexagonal stickies, and hanging them together on the wall. With this gesture, said the facilitators, mental models are “suspended” - as if hanging from a string in front of us. The coaching was to begin to see the mental models at work in the system.



Day Two

April 2, 2008

Learning Journeys

As John LeCarre said, “The desk is a dangerous place from which to view the world.” Learning Journeys give the group a chance to experientially see their system through other people’s eyes. Participants signed up for Learning Journeys to various locations and departed after some brief instruction and preparation. Again the group was asked to suspend judgement and see the places they were going to visit with “fresh eyes.”

The documentation team went with only one of the learning journeys, but received notes from all, which are included in this document as an appendix.



12:30pm Voices from the Field

Upon their return from the Learning Journeys, the group assembled in the main meeting room in a circle, standing. One at a time, participants stepped forward, and quoted a person they had met on their Learning Journeys, speaking in the first person. These quotes were statements that they found striking, statements that told them about how the other organizations work, and statements that inspired. Through this exercise, they brought the larger system into the room with them.

“We learned something about the importance of language along the way – and changed from Foundation for the Blind to Foundation of the Blind.”

“Every person in our organisation has something to do with the ways the organisation runs.”

“We do things this way because it is what’s right for the children.”

“The main reason that we are successful is that we narrow our focus on our services.”

“We deal with conflict by looking at our core values.”

“We have 180 employees and 200 volunteers, and have a waiting list for volunteers. We treat them the same as we treat employees.”

“We sought to change our community’s view of what we do.”

“At first, we placed all these restrictions on the kids. Then we asked the doctors, who said they could do anything – so we changed our thinking about how we work with the children!”

“We run some programmes so that people put their hands on their hearts and others so that they put them in their pockets.”

“Our users are called members.”

“We have 1000 staff, and what binds us together is that we know we all share values and passion.”

“We deliberately avoid government funding as it gives us more freedom.”

“I started this because there was no support for me – I needed to find what would support me.”

“We would love to come to your opening. We would love to help!”

“We are the guardians of your treasures.”

“Maori and Pacific Islanders are interested in a lot more than just things about Maori and Pacific Islanders.”

“We wanted to make a place where people felt comfortable and to which they want to return.”

“Our structure is made up of trustees and kaumatua.”

“We base services on need.”

“We rely on small amount of funding from tax payers.”

“We have to do a lot of fundraising to fill in the shortfall.”

“We serve 85% of NZ population and we need these structures to support us.”

“Nothing is more important to us than our core values.”

“We publish a newsletter that is nothing to do with work and is all about our staff.”

After this exercise, participants journaled on questions that are living for them now.

1:40pm Seeing and Mapping Our Mental Models

Sitting in groups of three and starting from the previous day's mental models exercise, participants reviewed their recent journal entries and sought to bring forward any further cherished ideas, beliefs, assumptions, fears, and dogmas, they see active in the effort to create a new CGO. They wrote short phrases describing these, read them aloud to the group, and placed them on a large white wall, facing the wall as an audience faces a theater.



Several members of the group agreed to help cluster the hexagons by theme and labels were created for each cluster (on green hexagons), representing an overarching theme. They read, from left to right, as follows.

- “We need to view mental health and addiction with new eyes.”
- “The structure must be consistent with who we are.”
- “Mental health and AOD have different needs.”
- “Peer support is beneficial and possible.”
- “If we don't compete, we won't survive.”
- “I believe: less talk, more action.”
- “We aren't in control.”
- “Our own fear will hold us back.”
- “We have doubts.”
- “Our diversity and uniqueness are strengths.”

This exercise culminated in a few minutes of silent reflection and journaling, with an optional “gallery walk” - a chance to get up close to the hexagons and study them. The question for reflection was:

Which of these mental models is operative in me?

Which of these is shaping the way I think, the way I engage, and the way I interact with others?

Letting Go, Letting Come

Participants had 50 minutes to walk through the grounds of the hotel, and were encouraged to take no cell phones, no distractions, and no notebooks - nothing to distract. This was meant to be time alone and in silence, letting go of anxieties and the need to find a resolution for the challenge at hand. This is “walking away from the mess” a “structured sleep.”

Upon returning, participants shared regarding what is becoming clear to them - with attention to the idea that individuals are the primary tool for changing social realities. Some of the insights were as follows.

“What is important to me is making sure that there is diversity – no matter what our culture is, we should have the opportunity to stand without being judged.”

“This process has made me understand more of what we are looking for in this CGO – and how we can make a difference.”

“I have identified strongly with fear – I had to find my path in this sector.”

“I feel strongly about working with different cultures and the movement in New Zealand at the moment – with what is going on within this sector. I want to help and contribute.”

“For me, the key word is creativity – the Picasso clip said a lot to me – a lot of my ideas pop up outside work.”

“Customer focus, respect, integrity, compassion – I look in myself, and see my own biases. The journey starts with myself – with what can I offer to this process.”

“What stands out for me is the importance of networking and getting different people together. I am also frustrated that this has not already been done. There are many hurdles to get through – and I’m just wanting to get it underway and not being able to get it done now.”

“It may take longer to find the clarity about what this is. There are many people that can contribute to the CGO that aren’t in it at the moment.”

“This is not the end; it’s only the beginning – there is a purpose.”

“The building of the Picasso painting had a profound effect on me – my life’s journey is to be here at this time and be a part of this journey. Trusting each one of us that we can do this and we can do it in a safe environment. Everyone’s journey has been different and everyone’s journey may not continue with this journey. I feel at peace with this project.”

“The image of a pendulum comes to me. There are so many different opinions and ideas. There are lots of similarities within the mental health and AOD and we need to work together.”

“Being out in the world alone is fearful – fear is the mind killer. We all have our own fears but the joining of our minds here has allowed us to form a nucleus, which comforts me = - united we stand alone we fall.”

“At my best I will challenge authority and be there for my people, at my worst I feel fear – that I may lose some of what I’ve got if I do say what I stand for. Supporting people to believe in their selves – challenge the stereotypes have a voice – that’s what I want to do – to be there for my people. I need to do that so I feel that I am alive. I know I can do that so I want to be able to give that.”

“Wearing the hat of the CEO of the org that has a contract in this CGO – I have realised that I am driven by fear of the possible failure – more so than I realised. This has interrupted my productivity. In order to be productive I have to recognise the components of the fear that I am experienced to allow others to help me with me with that.”

“Personal growth has become intertwined with this project. This project has brought both the best and worst out of me. Stress anxiety and frustration. My journey is about being more tolerant and more understanding – this is what I have to bring to this project.”

“There is a need for reassurance – we can give each other that. Part of the reassurance is due to the ownership. No one has the ownership is both a mental health and AOD project. We need to remember and reassure others of this. Each is not a tag-on to this project – they are a joint venture. So we are equally fearful. It will be owned by both parts of the sector.”

“I thought there was going to be nothing in the room when we came back. I wasn’t going to speak but I am. There are 2 emotions in this world – love and fear. We have had a chance to voice these fears. Fear

is false evidence appearing real. If this fear is false there is another side of love that will come through. I know we can all get on the side of love and move together with love. What blocks people is the fear and what unblock people is moving through the fear with love.”

“What is it you need from me? To be part of this CGO? I had a few revelations; one is that my alcoholism has ruined both of my marriages. My marriages were great: when I praised my partner and when I got loved back – that’s what I feel I can offer...I can be one with this organisation. I truly want the very best for this organisation.”

“What I see is that this looks beautiful because of our diversity. I am a drop of water in the ocean. I bring myself fully into this project. We can choose to either pick it up and run with it or drop it and run away. I feel strong in this room.”

“I feel strong now. I want better things for myself. We all deserve the best and we have the ability to change this and make this the best for this.”

“Everyone could be a consumer at some stage in his or her life – I feel like there is a lot of history in this room. I am finding it hard to let go of my preconceived ideas. We can’t be afraid of failure – we can learn from failure... there are options and we can choose. Consumers should have the power to choose which way through the system they want to go.”

“There are only 2 kinds of people in the world those who have a diagnosis and those who haven’t got one yet. If we sat down and wrote down all the skills, knowledge and experiences it would be amazing. We are all to the point where we can make a commitment to work together to get the maximum benefit. I am praying that we will have jurisdiction over the growth and the development. I have some thing to share and I feel I have a responsibility to share it. Both AOD and mental health have a lot to teach each other – if we can’t get the resources then we need to get out there and find some. I want to share as much as I can.”

“My walk created many thoughts...we can have a small focus, we can be small; but if we are effective and efficient then we can be of great service.”

“I have full faith that we have all the skills and compassion to make this work. Any masterpiece takes time – we have the capacity to make this happen.”

“Being labelled as a consumer, I feel really constricted. We don’t sub-discriminate. We don’t label ourselves in different ways like other sectors. Will we discriminate ourselves by doing this?”

“This process of creating this organisation is unique, so the way we do

our work will be emergent to us. I brought assumptions with me on how to run organisations, and I need to let those beliefs go – needing leaders, for example.”

“I am both sides of the scale here. I am trying to educate myself and I am grateful to be here. Mental and ADA go well together; I am proof. I hope that my kids wont go through what I went through, but I would like to think that there will be somewhere that they can go should they need help with the same issues.”

“A few things have surprised me over the last few days...there are some cultural differences that need to be worked out. I have a sense of over-responsibility and I need to create a balance between my life and my responsibility for part of this project. Life balance is something I will have to think about. I am fearful of what may result, but it is important to get the basics right at the beginning.”

“I am split down the middle, part bureaucrat and part radical. If this is to be owned collectively, we need to listen to each other. My fear is what I have to bringI’m afraid that my experience and knowledge will be perceived as overbearing. If you want it you can have it, and if you don’t I am fine with that.”



Day Three

April 3, 2008



9am Check In, Reflect, Move Forward

Participants learned of the death of a close colleague, and held a minute of silence in his honor. The reflections continued around the theme of freedom as a basis for healing, growth, and moving forward: the space between a stimulus and a response. Participants journalled on their own highest future potential, and on what they have energy to do in the efforts to create a new CGO, given everything they had experienced so far.

Initiative Seeds

What do you personally have energy to do? Participants wrote their answers to this question in short statements on blue cards, and, standing in a circle, shared them with the group. People listened for “allies” - those inclined in a similar direction, even if they don’t agree on specific action steps and priorities. Allies then banded together in order to establish working groups.

Participants then returned to the Studio in order to model initiatives.



The Studio

The final session of the workshop was held in the Studio. Bringing to bear all that participants had learned and experienced, they were asked to model their new initiatives from natural materials. The groups took turns coaching each other by asking questions to help facilitate new insights. Afterwards, the initiative groups had the chance to revise their models. Several of the models changed dramatically and were made stronger through this process.

The studio concluded with a presentation of initiative ideas using the models shown on an LCD projector for a reference point. Moving from the metaphor of the models to the tangible activities they represented, teams wrote down the main features of their initiatives, including concept, purpose, and people needed to realize the effort.



Moving Forward: Cultivation

These ideas are seeds for a future effort involving all collected stakeholders and their constituencies. Their strength lies in their diversity and their novelty, and they need good soil and care in order to be born and grow. To this end, the group held an afternoon session with the framing questions “How can we cultivate the seeds we’ve planted? What is needed from us as a group?” The session was somewhat squeezed in terms of time, and concluded with a listing of who needs what and who can offer what. This “needs/offers” exchange was documented to be taken forward by the project management team.



Appendix: Learning Journeys

St John

What stood out?

- Diversity
- Clarity, identification and commitment to core values
- Core values
- Structure keeping well being in place

What struck you?

- Welcoming and knowledgeable
- Diversity threading core values blend paid and voluntary
- Recognising conflict
- Role of history in foundation order of St John

- Judgement of crusades
- Order of St John (closed sense i.e. Masons)
- Positive and negatives
- Constantly evolving
- 120 years still there, resource, structure and sense of purpose
- Evolving from community essential in rural
- How much have to rely on fund raising
- Balance of business sales of First Aid Kits – service not core business → we do this to make up ‘shortfall’
- ‘offender’ for someone who did not reflect core values
- Definitely wanted to have 2 people in room, 1 Communication Manager
- Assumption 2 young
- ? did not want negative feedback going to DHB

Foundation of the Blind

- We were surprised and amazed at the similarities between our journey and theirs.
- The importance of words: from Foundation “for” the Blind to Foundation “of” the Blind (2002)
- It’s all about the members!! (Consumer = member)
- “The Foundation is the people”
- The happiness of the members is important
- Members can phone the chief executive
- Members CHOOSE what they want
- Members VOTE for the board and 3 out of 9 are members
- Members tell staff what to do BUT this is new and it is hard to motivate people to vote
- Members form community committees and provide peer support to each

- other
- All new members get mentors to walk alongside them
- 50% of staff are members (visually impaired)
- And you can’t use your blindness as an excuse
- The mix brings a rich of talents
- Some members don’t want to be a part of the organisation just to receive its services.
- Criteria for membership can be a problem – the ? and experience are not the same
- The foundation has many different funding sources
- This was an inspiring visit to an organisation that embodies evolution – they are still continually refining what they do
- On the wall was a poster showing a golf course:
- “Commitment - The distance to success is measured by you own DRIVE”
- Another poster on the wall:
- “Working together – coming together is a beginning. Keeping together is progress. Working together is a success”

Barnardo’s

- Introductions
- Overview of CGO project
- Acknowledgement of the project from Beth (Barnardo’s)
- Few years ago came up with ½ values: Integrity / Respect / Passion / Success. Barnardo’s has been functioning approx. 30 years. Document taken to all staff re: values. Needed buy in from staff. Reflecting back the values needed good values. Since being in place has utilised the values when supporting/working with each other.
- Discussion about Barnardo’s nation wide and it began – history – of the service. Dr Barnardo working with the homeless. Began in Mangere for young mothers. Flats in Mangere.
- Struggle in some communities
- Good reputation over the years
- Restructured often. Have 5 Management units around Auckland. Have area managers and team leaders
- Often Family support / supervised visits
- Barnardo’s have managers who look after the teams. Monthly meetings
- Communication can be hard
- Strengths in formal support/supervision
- Good mix of staff
- Funding comes from govt for family support services i.e. Plunket, MH, and District Health. Work with client 1:1. Negotiated rates/hours. Develop relationships
- Domestic violence work funding sought from Govt.
- Roll over contracts may put \$\$ in other areas
- CYF drive the needs for various areas
- Manage supervised visits between parents at day care centre

- Fundraising money assists the day care centre
- Barnardo's reviews funding annually nationwide via Regional Manager
- Have history/data that back up and support financial assistance etc. through the lengths of time Barnardo's have been around.
- What can we do or service are going to support a CGO? Why reinvent the wheel?
- Focus on parenting/teenage etc
- Opened teen mothers group – via approached Barnardo's
- S.W.O.T analysis – making it rough for children. Strengths / Weaknesses
- Core business – priority
- Core values, beliefs, principals. Vision
- Strategic plan, goals driven by local group, annual plan
- Work with age 0-17 year olds
- Conflict with PORES other service
- Audited by EROS
- Passion of the staff keeps them motivated.
- To do “get the passion, vision, core values, governance, leadership, heart of the matter.

Liberties – take ownership. This is what we will do, stick to it, commit to purpose, narrow focus

- Continuity – commit to 2 years – don't denote
- Managing fake mentality
- Nurturing leadership from grass roots
- Natural being in service – less
- Seed funders – govt take over funding
- Potential linkages
- Branding Consultation
- Similarity under label
- Volunteer board
- Community participation
- Every consumer quizzed – accountable to
- When people start jump on the same boat “one team”
- Peer support
- Piercing clarity of role
- Rewarding volunteers, training

What is our core business?

- Work alongside services that are already working
- What's right for the consumer/us?
- Have the passion = having the heart
- Not to turn anyone away. Non judgemental
- Links back to the children – the visions – the core business
- Is it looking at the vision, core values.
- Govt dictates the funding as well as pilot projects
- Money sought with backing from research
- Need buy in from the staff. Encouraging people
- Knowing the values and living with them
- Communication hard due to distance/regions
- Gone through structures and found something that works, enhancing and enabling communication

Canteen

- Apprehensive, personal loss, social
- Gaps in system
- New Experiences – T.V
- Thinking, arriving on time
- Xmas cards / bandana, contract
- Inspirational
- Are having fun not I'll have some fun.
- Looking forward
- Continuity of funding important
- Negative – life withering – pot plants
- Positive – huge amount to structure. Independent of Govt and cannot ?