

CFLR BOARD OF DIRECTORS Meeting

June 27, 2019

8:00 -9:15 a.m. – Rome Office

Agenda Item	Objective	Who	Time
Opening Remarks	Welcome and Introductions	K. Walters	8:00 a.m.
Staff Presentation	Strategic Planning – Brainstorming Discovery & Dream Set a date for late September/Early October to review draft plan for Board input	C. Sheets	8:05a.m.
Consent Agenda	<ul style="list-style-type: none"> • Minutes from previous meeting • Committee Reports 	K. Walters	8:25 a.m.
Finance/HR Report	<ul style="list-style-type: none"> • Financial Statements & minutes 	B. Reese	8:30 a.m.
Critical Issues	<ul style="list-style-type: none"> • Golf updates-Ambassador Program • Lease decision needed 	T. Wiggins C. Sheets	8:40 a.m.
Next Steps/ Executive Session	To review actions to be taken, by when and by whom	K. Walters	9:10 a.m.
Adjourn	Next Board Meeting –?? – seems like many are on vacation the last week of July. Do we split the months and do an earlier one in August? August 8th, 15th or keep at the 22nd?		9:15 a.m.

**Center for Family Life and Recovery, Inc.
Board of Directors Meeting**

Date: May 23, 2019

Time: 8am

Attendance: Cassandra Sheets, Terry Plizga, Kelly Walters, Brian Reese, Tom Reilly, Trevor Wiggins, Paul Dunn, Jeffrey Courter

Excused: David Wojnas, Rich Pratt

Topic	Discussion	Resolution	Person Responsible/ Time Frame
Opening Remarks	Kelly opened meeting 8:04am		
Consent Agenda	Review of Consent Agenda (Accepted.) - Minutes previous meeting - Committee Reports	Motion to Accept: Tom/Paul (all in favor)	
Staff Presentation – CEO Q &A	Narcan training information Community Foundation on June 20 th for business leaders and public access places, open to all too.	June 27 th is a 2 hour training on Narcan and Signs and Symptoms	
Critical Issues	CEC Ambassador program – no changes made Peer mentor program to do training to expand ambassadorship Board Commitment Golf Tournament Strategic Planning – Lee Livermore facilitator – ½ day with admin team and ½ day with Board and management to be in the middle of June To be finalized in September is due in 2020	Trevor Cassandra	

Respectfully submitted,
Terry Plizga
Board Secretary

Topic	Discussion	Resolution	Person Responsible/ Time Frame
Finance Committee Report <i>(Brian R.)</i>	<p>Audit Report – Brian went over preliminary - no concerns (any loss look is because of timing with the way the grants come in)</p> <p>Admin cost – have gone up a little bit but looking at adjustments for allocation. Like to stay around 15%</p> <p>Restricted funds - Board designated – Recovery fund</p> <p>New Standards –</p> <p>Lease agreement for Utica office – requesting letter from Brodock about difference of amounts that are owed from changes in the lease going back to 2014.</p> <p>Finance committee to work on a negotiation for the amount owed. Be able to vote in June board meeting once lease agreement is reached</p>	<p>Annually in the Audit/ Finance look at the number for expending funds</p> <p>Market Analysis Board will approve 1 more year, with the option of 5 more years.</p>	
Adjourn	<p>Motion to adjourn at 9:11am</p>	<p>Paul/Brian (all in favor)</p>	

Respectfully submitted,
Terry Plizga
 Board Secretary



**Center for Family Life and Recovery, Inc.
CEC/ Fund Development meeting**

Date: 6/11/19

Time: 8:00am

Attendance: Heather, Paul, Tom, Cassandra

Excused: John, Kelly W.,

Topic	Discussion	Resolution	Person Responsible/ Time Frame
Updates	Have a calendar of events Light of Hope – September 22 nd at 6pm Hanna Park, Utica, NY Utica Aud is going to light up purple for that night.	Send out quarterly Will send out flyers in the next couple of weeks.	Heather
Golf	September 15 th , 2019 – Woodgate	Money and teams are starting to come in. I will send out a report at the end of the month	Heather
Other	Friend raising event – Present and Past Board Members – Giving Tuesday Event	December 3 rd 430-630 Invite board past and present and sponsors as a thank you Where? – Adirondack Room Come find out what has happened since you left.... New Mission by then – light apps and mock tails	Trevor/Kelly
Next meeting	July 9th, 2019 8am		

Statement of Revenue and Expense
 Current Period: 5/1/2019 - 5/31/2019
 Year-to-Date: 1/1/2019 - 5/31/2019

	Current Year Current Period	Current Year Year-to-Date	Prior Year Current Period	Prior Year Year-to-Date
Revenue				
Contributions/Donations	0.00	529.49	34.39	1,226.39
Donations Compeer	1,500.00	1,500.00	0.00	0.00
United Way Revenue	3,707.67	10,071.71	970.43	11,852.15
Fund Raising Event	0.00	11,034.75	0.00	10,821.87
Government Grants	84,431.53	420,280.82	82,262.70	431,361.37
Contract Revenue	35,217.92	183,339.57	47,292.71	218,492.54
Parole/SIST Revenue	4,695.00	23,840.00	19,460.00	43,825.00
Community Partner Grant	18,953.93	38,892.49	0.00	16,900.00
Program Fees - Individ	1,209.00	9,749.00	1,528.00	7,213.00
IDP fees	4,176.00	19,781.00	3,560.00	15,025.00
DRT fees	520.43	2,794.71	4,066.03	6,090.58
EAP Service fee	15,992.15	89,553.07	23,474.86	89,828.49
EAP training fee	0.00	0.00	0.00	200.00
Compeer Revenue	666.67	3,333.33	833.34	4,166.67
City of Utica CDBG	0.00	1,500.00	0.00	1,500.00
Interest Income	18.40	56.76	20.49	87.38
Unrealized Gain on Investment	(11,539.82)	18,970.93	3,083.78	1,073.49
Miscellaneous Income	5.00	786.88	135.41	1,200.39
Total Revenue	159,553.88	836,014.51	186,722.14	860,864.32
Expenses				
Salaries Direct Staff	82,549.85	485,438.70	102,991.21	521,818.24
FSP On Call	150.00	750.00	200.00	800.00
Salaries Administrative/P.A.	11,535.62	65,418.30	12,657.79	63,181.54
Health Insurance	208.75	1,285.90	317.30	9,623.86
Life Insurance	212.34	1,043.12	240.80	988.62
Long Term Disability	321.60	1,686.63	400.32	1,680.79
FICA Expense	7,281.36	41,798.33	8,831.07	45,162.16
Workers Compensation	1,314.08	7,854.49	1,963.10	11,479.94
NYS Unemployment	0.00	0.00	1,250.00	6,817.83
Disability Expense	0.00	0.00	0.00	856.00
401k Match Expense	833.33	4,166.69	833.33	4,166.65
Professional Fees/ Supervision	1,558.72	9,210.42	4,080.16	9,324.04
Audit Expense	883.37	4,416.85	883.37	4,416.85

Statement of Revenue and Expense
 Current Period: 5/1/2019 - 5/31/2019
 Year-to-Date: 1/1/2019 - 5/31/2019

	Current Year Current Period	Current Year Year-to-Date	Prior Year Current Period	Prior Year Year-to-Date
Supplies	2,965.77	16,231.16	6,001.22	20,612.21
EBP Material	0.00	15.47	0.00	0.00
Marketing Expense	850.00	5,896.04	7,759.00	8,147.00
Insurance Expense	1,224.67	8,290.28	1,209.42	8,198.75
Telephone Expense	3,059.21	13,149.02	2,080.28	12,733.60
Postage Expense	200.00	800.00	200.00	1,315.96
Rent Utica	7,923.50	34,957.50	6,758.50	33,792.50
Rent Herkimer	650.00	3,250.00	650.00	3,250.00
Rent Rome	600.00	3,200.00	600.00	3,000.00
Rome Utilities	117.03	586.70	85.66	489.00
Equipment Rental-Lease	433.75	1,842.50	108.75	217.50
Setup/Background Check	0.00	188.00	0.00	35.75
Website/Tech Fees	4,746.13	22,257.18	4,907.48	17,060.91
Printing	303.30	604.10	1,817.56	4,885.81
Travel	2,989.46	12,474.27	5,782.94	17,222.05
Conference/Training	2,769.89	5,429.09	4,412.54	6,144.54
EAP subcontract	65.00	130.00	130.00	130.00
Client Programming Expense	100.00	756.87	950.24	3,108.88
Dues/Membership Fees	209.00	1,301.50	0.00	1,280.00
Admin Fees	70.21	342.81	66.74	325.77
Depreciation Expense	1,700.00	8,500.00	1,275.00	6,375.00
PayPal Fees	30.00	120.00	30.00	150.00
Bank Fees	154.06	802.61	100.74	685.35
Payroll Fees	919.40	6,475.34	650.50	3,436.42
Fund Raising Expense	0.00	2,640.00	0.00	1,725.00
Miscellaneous Expense	0.00	5,387.22	104.93	460.62
Total Expenses	138,929.40	778,697.09	180,329.95	835,099.14
Excess or (Deficiency) of Revenue Over Expenses	20,624.48	57,317.42	6,392.19	25,765.18

CFLR
Balance Sheet
As of Date: 5/31/2019

	Current Year	Prior Year
Assets		
Current Assets		
Operating	244,855.53	88,157.31
Recreation	1,598.10	1,269.11
Payroll	3,856.97	1,892.26
Savings	200,247.32	180,114.72
Unemployment Acct	50,623.36	46,823.20
Investment Acct	295,122.15	312,909.22
Accounts Receivables	191,258.59	272,593.66
Miscellaneous Receivable	0.00	13,823.00
Miscellaneous Receivable	1,595.00	1,595.00
Prepaid Expenses	0.00	11,051.34
Total Current Assets	989,157.02	930,228.82
Fixed Assets		
Equipment	111,460.99	111,460.99
Computer Equipment	85,503.35	85,503.35
Furniture	26,253.98	26,253.98
Accum Depreciation	(161,842.74)	(138,385.42)
Total Fixed Assets	61,375.58	84,832.90
Other Assets		
Rent Deposit Court St	2,000.00	2,000.00
Rome Office Security Deposit	1,400.00	600.00
Herkimer Office Security Deposit	650.00	650.00
Rome office utility deposit	130.00	130.00
Total Other Assets	4,180.00	3,380.00
Total Assets	1,054,712.60	1,018,441.72
Liabilities & Net Assets		
Liabilities		
Current Liabilities		
Accounts Payable	11,121.50	11,677.17
Dental Insurance Payable	85.70	(160.51)
Vision Payable	(453.07)	(423.15)
Disability Payable	(349.40)	1,170.24

CFLR
Balance Sheet
As of Date: 5/31/2019

	Current Year	Prior Year
FICA Payable	0.00	95.63
Federal Withholding Taxes	0.00	275.46
NYS Withholding Taxes	0.00	97.69
New York Paid Family Leave	889.74	1,366.02
United Way Withholding	240.63	(310.48)
Employee 401k	(128.47)	(793.56)
Accrued 401k Match	24,167.13	4,167.09
Allstate & Colonial-Ins.	174.56	73.29
Miscellaneous W/H	1,224.56	1,109.21
Life Insurance/Employee Paid	1.53	(20.00)
Accrued Audit	4,117.73	3,842.29
Accrued Salary	54,997.14	57,185.54
Accrued Vacation	12,775.26	10,426.93
Accrued Taxes	4,190.37	4,329.53
Accrued Expenses	1,635.33	7,885.33
Deferred Revenue	91,797.72	13,576.20
Deferred Revenue EAP	15,992.15	16,059.67
Total Current Liabilities	222,480.11	131,629.59
Total Liabilities	222,480.11	131,629.59
Net Assets		
Unrestricted Fund Balance	679,617.59	734,197.23
Board Restricted – Compeer Funds	36,792.00	6,792.00
Board Restricted Recovery Funds	110,822.90	0.00
E.M. Rose-Restricted Fund Bal	0.00	56,452.93
M.Marietta-Restricted Fund Bal	0.00	38,756.27
United Way Restricted Fund Balance	5,000.00	5,000.00
EleanorWalshVertimerEndowment	0.00	23,020.70
Temporarily Restricted FB	0.00	22,593.00
Total Net Assets	832,232.49	886,812.13
Total Liabilities & Net Assets	1,054,712.60	1,018,441.72

CFLR
A/R Aging Report
As of Date: 5/31/2019
Aged By: Due Date

Invoice #	Post Date	Due Date	Doc Date	Current	1 - 30	31 - 60	61 - 90	Over 90	Total
Billing Group: <none>									
Americu Credit Union									
001359	4/1/2019	4/1/2019	4/1/2019	0.00	0.00	1,057.35	0.00	0.00	1,057.35
Total:				0.00	0.00	1,057.35	0.00	0.00	1,057.35
City Of Utica CDBG									
12312018	12/31/2018	12/31/2018	12/31/2018	0.00	0.00	0.00	4,500.00	0.00	4,500.00
3312019	3/31/2019	3/31/2019	3/31/2019	0.00	0.00	1,500.00	0.00	0.00	1,500.00
Total:				0.00	0.00	1,500.00	4,500.00	0.00	6,000.00
Clinton Early Learning Center									
001318	1/1/2019	1/1/2019	1/1/2019	0.00	0.00	0.00	480.00	0.00	480.00
Total:				0.00	0.00	0.00	480.00	0.00	480.00
Dual Recovery Training									
5312019	5/31/2019	5/31/2019	5/31/2019	1,538.16	0.00	0.00	0.00	0.00	1,538.16
Total:				1,538.16	0.00	0.00	0.00	0.00	1,538.16
Family Support Program									
5312019	5/31/2019	5/31/2019	5/31/2019	21,678.04	0.00	0.00	0.00	0.00	21,678.04
Total:				21,678.04	0.00	0.00	0.00	0.00	21,678.04
First Source FCU									
001325	1/1/2019	1/1/2019	1/1/2019	0.00	0.00	603.50	0.00	603.50	603.50
001363	4/1/2019	4/1/2019	4/1/2019	0.00	0.00	603.50	0.00	603.50	603.50
Total:				0.00	0.00	603.50	0.00	603.50	1,207.00
Herkimer Co TANF Grant									
5312019	5/31/2019	5/31/2019	5/31/2019	2,972.73	0.00	0.00	0.00	0.00	2,972.73
Total:				2,972.73	0.00	0.00	0.00	0.00	2,972.73
Herkimer Co. DSS									
1312019	1/31/2019	1/31/2019	1/31/2019	0.00	0.00	0.00	2,310.00	0.00	2,310.00
2282019	2/28/2019	2/28/2019	2/28/2019	0.00	0.00	0.00	2,475.00	0.00	2,475.00
3312019	3/31/2019	3/31/2019	3/31/2019	0.00	0.00	2,035.00	0.00	0.00	2,035.00
4302019	4/30/2019	4/30/2019	4/30/2019	0.00	0.00	1,320.00	0.00	0.00	1,320.00
5312019	5/31/2019	5/31/2019	5/31/2019	1,650.00	0.00	0.00	0.00	0.00	1,650.00
Total:				1,650.00	0.00	1,320.00	2,035.00	4,785.00	9,790.00

CFLR
A/R Aging Report
As of Date: 5/31/2019
Aged By: Due Date

Invoice #	Post Date	Due Date	Doc Date	Current	1 - 30	31 - 60	61 - 90	Over 90	Total
Billing Group: <none> (cont'd from page 1)									
Holland Patent Central School									
158	5/31/2019	5/31/2019	5/31/2019	2,080.00	0.00	0.00	0.00	0.00	2,080.00
Total:				2,080.00	0.00	0.00	0.00	0.00	2,080.00
Impact Program									
10312017-1	10/31/2017	10/31/2017	10/31/2017	0.00	0.00	0.00	0.00	7,646.00	7,646.00
10312018	10/31/2018	10/31/2018	10/31/2018	0.00	0.00	0.00	0.00	7,999.00	7,999.00
Total:				0.00	0.00	0.00	0.00	15,645.00	15,645.00
Masonic Medical Research Laboratory									
001335	1/1/2019	1/1/2019	1/1/2019	0.00	0.00	0.00	0.00	1,000.00	1,000.00
Total:				0.00	0.00	0.00	0.00	1,000.00	1,000.00
Mohawk Valley Health Systems									
001374	4/1/2019	4/1/2019	4/1/2019	0.00	0.00	18,093.75	0.00	0.00	18,093.75
Total:				0.00	0.00	18,093.75	0.00	0.00	18,093.75
NYS-OSC- SIST									
1281	4/30/2019	4/30/2019	4/30/2019	4,475.00	0.00	925.00	0.00	0.00	925.00
5312019	5/31/2019	5/31/2019	5/31/2019	4,475.00	0.00	925.00	0.00	0.00	4,475.00
Total:				4,475.00	0.00	925.00	0.00	0.00	5,400.00
NYS-OSC-Parole									
2282019-1	2/28/2019	2/28/2019	2/28/2019	0.00	0.00	270.00	280.00	185.00	185.00
3312019	3/31/2019	3/31/2019	3/31/2019	0.00	0.00	270.00	280.00	185.00	280.00
4302019	4/30/2019	4/30/2019	4/30/2019	0.00	0.00	270.00	280.00	185.00	270.00
5312019	5/31/2019	5/31/2019	5/31/2019	0.00	0.00	270.00	280.00	185.00	220.00
Total:				220.00	0.00	270.00	280.00	185.00	955.00
OMH-NY									
1212017	12/1/2017	12/1/2017	12/1/2017	0.00	0.00	0.00	0.00	11,429.00	11,429.00
Total:				0.00	0.00	0.00	0.00	11,429.00	11,429.00
Oneida Co. DSS									
1312019	1/31/2019	1/31/2019	1/31/2019	0.00	0.00	0.00	0.00	180.00	180.00
3312019	3/31/2019	3/31/2019	3/31/2019	0.00	0.00	0.00	0.00	90.00	90.00
4302019	4/30/2019	4/30/2019	4/30/2019	0.00	0.00	90.00	0.00	90.00	90.00
5312019	5/31/2019	5/31/2019	5/31/2019	0.00	0.00	90.00	0.00	90.00	90.00

CFLR
A/R Aging Report
As of Date: 5/31/2019
Aged By: Due Date

Invoice #	Post Date	Due Date	Doc Date	Current	1 - 30	31 - 60	61 - 90	Over 90	Total
Billing Group: <none> (cont'd from page 2)									
Oneida Co. DSS (cont'd from page 2)									
Total:				90.00	0.00	90.00	90.00	180.00	450.00
Oneida Co. Office Of Mental Health									
5312019-1	5/31/2019	5/31/2019	5/31/2019	8,333.33					8,333.33
5312019-2	5/31/2019	5/31/2019	5/31/2019	16,722.67					16,722.67
5312019-3	5/31/2019	5/31/2019	5/31/2019	4,166.00					4,166.00
Total:				29,222.00	0.00	0.00	0.00	0.00	29,222.00
Oneida County Public Health									
5292019	5/29/2019	5/29/2019	5/29/2019		4,440.00				4,440.00
Total:				0.00	4,440.00	0.00	0.00	0.00	4,440.00
Rome Memorial Hospital									
001283	7/1/2018	7/1/2018	7/1/2018					1,795.00	1,795.00
001349	1/1/2019	1/1/2019	1/1/2019					1,768.28	1,768.28
001379	4/1/2019	4/1/2019	4/1/2019			1,768.28			1,768.28
Total:				0.00	0.00	1,768.28	0.00	3,563.28	5,331.56
Saugquoit Valley Central School District									
157	5/31/2019	5/31/2019	5/31/2019	1,038.89					1,038.89
Total:				1,038.89	0.00	0.00	0.00	0.00	1,038.89
Sex Offender Treatment Program									
5312019	5/31/2019	5/31/2019	5/31/2019	2,306.42					2,306.42
Total:				2,306.42	0.00	0.00	0.00	0.00	2,306.42
Suicide Prevention									
5312019	5/31/2019	5/31/2019	5/31/2019	4,510.42					4,510.42
Total:				4,510.42	0.00	0.00	0.00	0.00	4,510.42
Supportive Case Management									
5312019	5/31/2019	5/31/2019	5/31/2019	20,625.29					20,625.29
Total:				20,625.29	0.00	0.00	0.00	0.00	20,625.29
Workforce Development Board									
5312019	5/31/2019	5/31/2019	5/31/2019	1,020.00					1,020.00
5312019-1	5/31/2019	5/31/2019	5/31/2019	5,915.76					5,915.76

CFLR
A/R Aging Report
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Aged By: Due Date

Invoice #	Post Date	Due Date	Doc Date	Current	1 - 30	31 - 60	61 - 90	Over 90	Total
Billing Group: <none> (cont'd from page 3)									
Workforce Development Board (cont'd from page 3)									
Total:				6,935.76	0.00	0.00	0.00	0.00	6,935.76
Young Scholars									
312019	3/1/2019	3/1/2019	3/1/2019	0.00	0.00	0.00	0.00	17,072.22	17,072.22
Total:				0.00	0.00	0.00	0.00	17,072.22	17,072.22
Total:				99,342.71	4,440.00	24,127.88	3,905.00	59,443.00	191,258.59
Report Total:				99,342.71	4,440.00	24,127.88	3,905.00	59,443.00	191,258.59

Introduction to

Appreciative Inquiry



An introduction to Appreciative Inquiry
through personal stories and experiences

Robyn Stratton-Berkessel

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Welcome!

You will find an overview of Appreciative Inquiry in the following pages. If you are learning about this positive change methodology for the first time, I trust you will feel an excitement and energy about what you are discovering.

Most people feel hugely relieved that there is another way of “being” in the world. This could mean that intuitively, you had sense that leading with your heart, seeing possibilities and including different perspectives and more voices is indeed a viable option.

You see the value in celebrating what works, appreciating the beauty and goodness in ourselves and each other, and recognizing this approach is more likely to lead to greater flourishing and a more meaningful life, personally and professionally.

In this e-book, you’ll find out about the process of Appreciative Inquiry, which is called the 4-D Cycle.

I offer a description of each of the four “D”s - Discover, Dream, Design and Destiny. I introduce the “positive core” and the “Affirmative Topic.”

You’ll read about the art of asking questions and the power of story telling.

Appreciative Inquiry is about asking unconditionally positive questions to focus conversation and dialogue on

what has worked in the past, works in the present, and is likely to continue to work in the future.

Significantly, the stories we tell ourselves get lived out daily. They guide our beliefs and choices, thereby impacting our decisions and actions.

An Introduction to **Appreciative Inquiry**

an e-book offering examples and personal stories



Appreciative Inquiry – AI - is a perspective on the world that invites us to see ourselves and the world through an appreciative or valuing eye. We are made aware that language, questions, and stories shape our destinies.

This e-book provides an introduction to Appreciative - the what and the why. You'll find out that Appreciative Inquiry shines the light on existing strengths and assets, thereby amplifying what we do best, which in turn fuels us with greater energy and aliveness.

“The deepest principle in human nature is the craving to be appreciated.” — William James

About the Author

My name is Robyn Stratton-Berkessel. I'm a speaker, an author, facilitator and designer, specializing in Appreciative Inquiry. My book on AI, "Appreciative Inquiry for Collaborative Solutions: 21 Strength-based Workshops" (2010) Pfeiffer, San Francisco is a highly practical book; and my first app for iPad, "Embracing Change" is a practical coaching guide. My goal is to live appreciatively and provide tools to make it easier to live with greater awareness of what gives us joy, builds our resiliency and helps us be more personally empowered.

You'll read why sunflowers feature in this ebook. I had great fun in photographing them. I have learnt that photography is such an appropriate metaphor for exercising the appreciative eye. It's an activity of looking for the best in a scene and then later, in the digital dark room, I edit, edit, edit until I find the best to expose.

I so resonate with Dewitt Jones, the world famous photographer:

“Photography as a spiritual practice: a disciple that allows me a thousand new perspectives on the world. A discipline that takes me to a place of reverence. To a place where I can be the watcher, the appreciator,

the celebrator and, ultimately just the lover of the incredible beauty it allows me to witness.”

What’s important to me is to catalyze the power of participation, engagement and collaboration and incorporate these principles into all my work. My extensive experience in corporate and educational environments spans near 30 years on three continents across many industries. In the areas of business strategy, organization development and culture change, I’ve worked with some of the biggest and brightest companies; as well as some of the smallest, most caring, local communities on issues dear to their hearts.

I love technologies that facilitate our global connection and make our interconnectedness palpable. Being part of the digital world is very exciting to me and sparks creativity at many levels across all disciplines.

Sunflowers and Appreciative Inquiry



Sunflowers are happy-making flowers! If you've ever gazed across a field of sunflowers, as I have had the good fortune to do in the hills of Tuscany, Italy, it makes you smile so broadly that you feel like jumping for joy. Their big, bright yellow heads all face the same direction to form a bright yellow blanket of sunny faces.

That's what's so special about sunflowers, They actually turn their heads to face the sun. They follow the sun from dawn to dusk. The sunflower is a heliotropic plant. Helios is the ancient Greek for sun. Sunflowers turn to the light and the warmth for growth.

Symbol for Appreciative Inquiry

The practice of Appreciative Inquiry has a lot in common with sunflowers. In fact, for me the sunflower is the symbol of Appreciative Inquiry. Just as sunflowers turn to the sun for light and energy, so too, do we humans grow

and light up with great energy in a field of abundant, sunny appreciation and positivity. We literally light up when basked with appreciation.

If this e-book is your introduction to Appreciative Inquiry – AI for short, it's my hope you'll enjoy a tiny taste of what AI is and how AI works. You could say when you live your life with Appreciative Inquiry, you are cultivating a heliotropic mind.

Hints about Appreciative Inquiry



To get started, here are some hints about Appreciative Inquiry and how it helps to make sense of our world.

1. Appreciative Inquiry helps us understand:

- how we tell stories and construct narratives
- how we interpret things
- how we make meaning of our own stories and the stories of other people
- how we make sense of our lives, and by extension
- how we make sense of our world

2. AI helps with relationships, making us more aware of

- how we relate to ourselves

- how we relate to others
- how we relate to the world itself

3. AI helps us become more conscious of

- how we use language
- how we focus our attention
- how we create the results we get
- how we label things
- how we deal with change
- how we envision our future
- how we choose to live our lives

Stated a little more fully:

- Appreciative Inquiry is the discovery for the best in people, their organizations, and the relevant world around them.
- It is an art and practice of asking unconditional, positive questions that strengthen a system's capacity to apprehend, anticipate and heighten positive potential.
- Instead of negation, criticism and spiraling diagnosis, there is discovery, dream, design and destiny.

Source:

David L. Cooperrider, Diana Whitney, Jacqueline M. Stavros, ***“Appreciative Inquiry Handbook”***, 2003, Lakeshore Publications.

What is Appreciative Inquiry?



Appreciative Inquiry looks for what's already working well in a person or situation, not what's broken. It takes a little practice to make that shift, as our default seems to look for what's wrong in our society.

One of the key principles of AI is 'what you study grows'. If you study deficits, you'll find many, and if you study success, you'll find a lot of it. So AI is both a way of thinking and doing. It provides a framework and a method to initiate thoughts and actions that can produce outcomes directed with intentionality toward affirming life, heightening positive energy and uplifting the human spirit.

Being heliotropic, just like the sunflower

AI, is a co-creative way of living, meaning that we co-create or co-construct meaning and make sense of our situations in our relationships with others. How people interact and engage with each other determines a reality. We can build harmonious relationships or hostile. We can

be inclusive or exclusive. We can lift people up or let them down. We can heighten peoples' spirits or dampen them.

AI provides a framework to help us engage with the world from an 'appreciative lens' through which we inquire about the good, the beautiful, the true instead of the opposite.

We are well aware that things happen – birth, illness, death, earthquakes, floods, robberies and accidents.

Key questions to ponder:

- How do we handle such things?
- What labels do we apply?
- What judgments do we make?
- What meaning do we attribute to events, positive and negative?
- What stories do we pay attention to and spread?
- What do we focus on?
- How do we construct our reality?

Appreciative Inquiry is about inquiry. We live in a state of appreciative inquiry.

Our imaginative capacity

One of our greatest assets as human beings is our imaginative capacity. We can imagine the best and we can image the worst.

“Imagination is everything. It is the preview of life’s coming attractions.” — Albert Einstein

As a life-centric change process, Appreciative Inquiry pays attention to the best in us, not the worst; to our strengths, not our weaknesses; to possibility thinking, not problem thinking. Appreciative Inquiry is an affirming way to embrace human, institutional and organizational change.

It is a change method with the perspective that every system, human and otherwise, has something that works right—things that contribute to its aliveness, effectiveness, and success, connecting it in healthy ways to its constituents and the wider community. With the Appreciative Inquiry perspective, we can create positive change that is sustainable, enlivening and expands our universal consciousness.

Appreciative Inquiry is Strength-based



Finding, Trusting and Developing Strengths

Before I even started school, I remember being an annoyance to my grandmother, mother and father because they thought I asked too many questions.

“Curiosity killed the cat” was one of the many proverbs my grandmother delighted in repeating to me, every time I poked my head into something new, or asked “Why?” It silenced me, as I was upset by the idea of “killing cats.”

My mother, too, after endless “Why?” questions, in frustration would sigh, “Because I said so” or “‘Y’ is a crooked letter that can’t be made straight.” I had to pause to think hard about trying to straighten the letter “Y” and wouldn’t dare ask, “Why does it need to be straightened?”

Even my father would tell me, “Mind your p’s and q’s.” I couldn’t fathom that one.

In spite of these early reprimands, it seems my curiosity, love of learning, and desire to seek out new ideas have been my constant guides. These days, whenever I am in a new territory, I am called to go further to explore what's around the corner, over the hill, or beyond the horizon.

I am truly satisfied when I discover for myself what I can learn and what new ideas come up that stimulate possibility-thinking and what-if scenarios.

Playing to Strengths

After all these years, I know now that curiosity, love of learning, collecting ideas, and seeing the big picture are my best attributes, or my signature strengths. I know I am most satisfied when I am playing or working to these strengths.

It's a relatively new, and thankfully a growing trend, to focus on and develop strengths. Yet, the old paradigm of 'overcome weaknesses first' is played out every day in most of our homes, our schools, our institutions, and our places of work and worship.

The behaviors, the processes, the decisions that are weak or problematic in some way, are the first to grab our attention. We focus on the things that "need fixing." As a consequence, those behaviors, thoughts, feelings, decisions, and processes that are working well and bring us successes don't attract the same attention or the investment of resources.

We invest energy, money, time, intellect, and emotion into things that don't work for us instead of putting energies into those things that will give us an easier and a much-amplified return for our efforts and investments.

Developing Strengths

Key question: Are we better off investing in and developing strengths – defined as innate talents that can be more easily and speedily developed – than dealing with weaknesses that can be worked around and will take more effort, time and resources and always be a struggle?

The late management and leadership guru, Peter Drucker's quote is relevant more than ever:

“The task of leadership is to create an alignment of strengths, making our weaknesses irrelevant.”

Process of Appreciative Inquiry



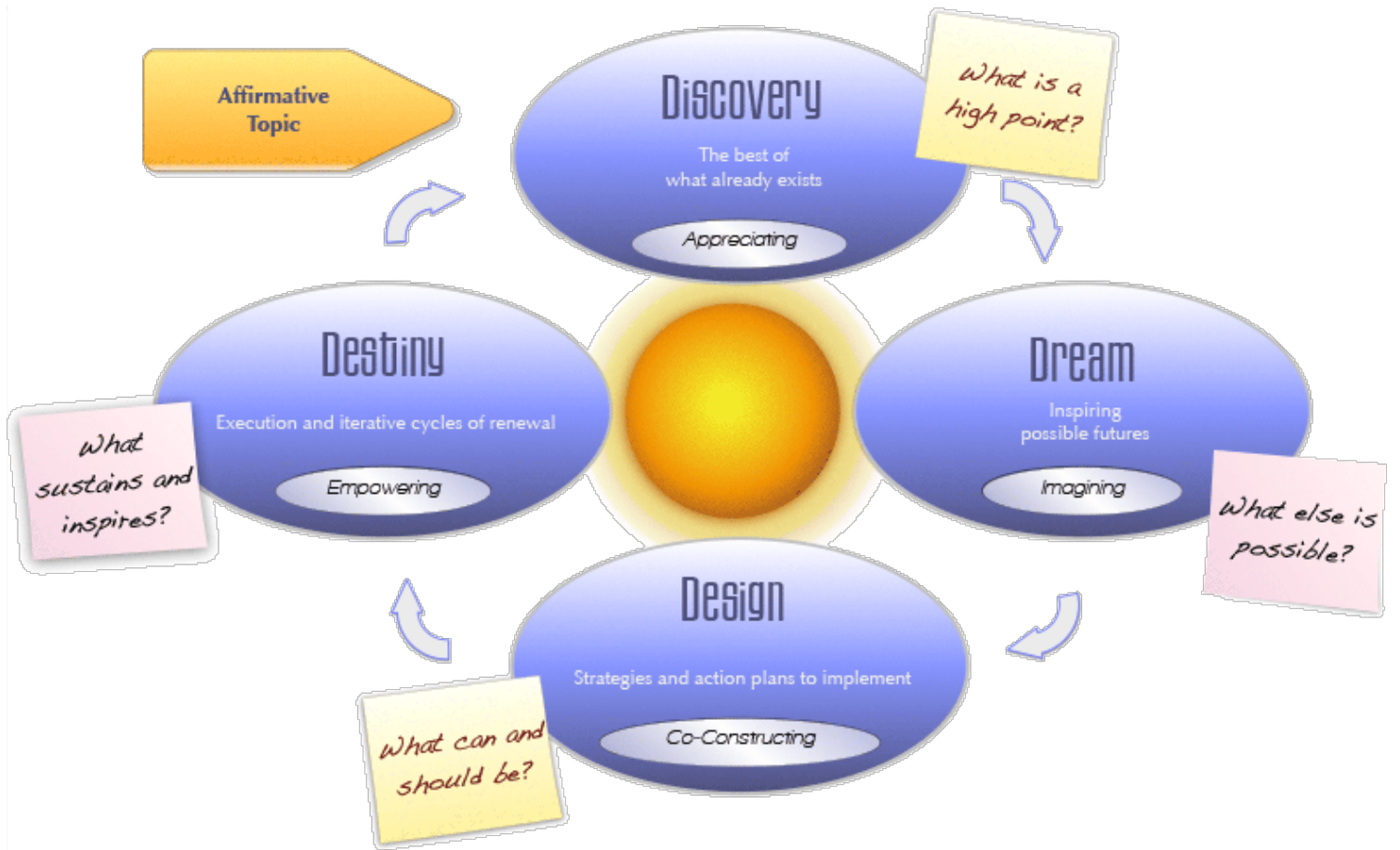
Discover, Dream, Design, Destiny

Appreciative Inquiry is a strength-based, generative approach to change and development which starts from what already works in a given context, and seeks to discover strengths, existing assets and potentialities.

This differs from the traditional approach, which zeros straight in on the problem, so prevalent in our organizations, institutions, and families. The process of Appreciative Inquiry is named the 4-D Cycle.

You see this process represented graphically:

4-D Cycle Illustration



The four steps in the iterative cycle:

Step 1: Discover

Discover high-point experiences and identify strengths and capabilities— all of which add up to the “positive core.”

Step 2: Dream

Dream— imaginatively and collectively envision what else is possible.

Step 3: Design

Design— co-construct what can be done to build capacity (practically) and what should be done (morally).

Step 4: Destiny

Destiny— commit to the iterative exploration of learning, innovation, and delivering results all stakeholders care about.

In relation to the 4-D cycle, two important factors distinguish Appreciative Inquiry from other change methods:

Affirmative topic

It is the *affirmative topic* of the inquiry that sets the frame and guides the entire conversation or

agenda. The individual or community, or organization inquires into a topic that they want to bring to life. It's forward-looking, possibility-focussed. This differs from the traditional backward looking, problem-focused way of creating change.

Positive core

The articulation of the *positive core*, which represents the collective attributes, strengths, and assets of the system, remains central and pivotal to the Dream, Design, and Destiny phases in the Appreciative Inquiry process. All dream work and design work is grounded in the existing positive core.

The Art of Asking Questions



Appreciative Inquiry is the art of asking unconditional, positive questions to strengthen the system's capacity to anticipate and heighten positive potential.

Appreciative Inquiry emphasizes the art of crafting positive questions.

The following summarizes the Appreciative Inquiry perspective on questions:

- We live in a world our questions create.
- Our questions determine the results we achieve.
- The more positive our question, the more it will create the possible.
- Our questions create movement and change.

Four Foundational Questions



Here are the four foundational interview questions for a business situation. You can substitute ‘organization’ with ‘relationship’, or ‘career’, or ‘wellness regime’.

- i. What has been a high-point experience in your organization/division when you felt most alive, successful, and effective?
- ii. Without being humble, what do you value most about yourself, your work, and your organization?
- iii. What are the core factors that make this organization function at its best, when it feels a great place to be in, and without which it would cease to exist?
- iv. Imagine it is three years into the future and the organization is just as you would want it to be. What’s happening that makes it vibrant and successful? What has changed? What has

stayed the same, and how have you contributed to this future?

- What can you continue doing to keep the good?
- What can you begin to do to make it better?
- What can you stop doing because it no longer serves or gets in the way?
- What are some transitions you'll need to make to because you have existing responsibilities and constraints, and can't just drop everything immediately?

Appreciative Inquiry in Action – Story Telling



Telling Stories and Constructing Narratives

We are all story tellers. We depend on a regular narrative to help us navigate through our days. We tell each other stories everyday: at home with our families, at work with our colleagues and clients, at play with our mates, and in romance with our lovers. Who you hang out with informs your narrative – your story. What TV shows you watch, what clothes you buy, the food you eat and all that you regularly do informs your world view and is your story.

Significantly, the stories we tell ourselves get lived out daily. They guide our beliefs and choices, thereby impacting our actions. As we become more conscious of our own stories and the stories of others, we begin to notice different perspectives and potentially reach new levels of understanding. We begin to make sense of complex issues, and together we can create new stories.

A beautiful quote says it all:

“Remember, you don’t fear people whose stories you know, real listening always brings people closer together.” – Meg Wheatley

Openness

When we are open with each other to truly connect, we find our intersect points, and from that shared place of common humanity we begin to share dreams and aspirations, addressing problems in different ways. One of the ways we do this is story telling. It is through telling our stories that we transcend our differences as we discover our universal connection with others.

As we talk to each other, we set the course for action. If a conversation is filled with uplifting stories of success and joy, you are more than likely to pitch in with your own stories of success, and others will do the same. As you construct meaning in relationship with others, you begin a process of developing an expanded understanding about success from all the perspectives in the conversation. The stories begin to mingle and form a collective story that you begin to share and spread.

Direction of your story

So what are your stories? Do they ignite you with greater energy, increasing your levels of satisfaction and joy, supporting you in upward spirals, or do they do the opposite: send you off on a downward spiral associated with energy loss, dissatisfaction, and feelings of life being sapped.

If you want to change something in your life, a way to start is to change your story. Start telling a different story. What you study grows.

We can change our story

We can live ourselves into a new reality if we want to change something. We can give our power away, or we can take our power back. That's what we do if we want to change: we start by constructing a new narrative. It's true for individuals, organizations and countries. That's what Nelson Mandela did, what Martin Luther King did, what Mother Theresa did, what many artists, actors and athletes do. You will know people in your own life who are rewriting their narratives because they can. You may know them personally, or you know them through the media.

Additional Resources

Here are some other resources you might like to take a look at to help you build your positivity muscle.

You might be interested to read more about the [process, principles and practice of Appreciative Inquiry](#) in this longish post.

Positivity Strategist Podcast

An interview show with thought leaders on appreciative inquiry and other leading positive change methodologies, helping you grow in your business, career and personal life. Our conversations with inspiring leaders and everyday people show how positivity helps them live a full and meaningful life.



You can follow or subscribe to my Podcast at

<http://positivitystrategist.com/podcast/>

Appreciative Inquiry Resources Page

<http://positivitystrategist.com/appreciative-inquiry-resources/>

Positivity Resources Page

<http://positivitystrategist.com/appreciative-inquiry-resources/Book and Apps>

Books and Trainings

[*Appreciative Inquiry for Collaborative Solutions - 21 Strength-based Workshops*](#)

(2010), Pfeiffer, Imprint of John Wiley, San Francisco



[*Positive Change Training Site*](#)

Free and paid training courses on Positivity and Appreciative Inquiry

TEDx Talk

[TEDxNavesink “Playful](#)

[Inquiry - try this anywhere”](#)

In my TEDx talk, I show how a simple, intentionally appreciative inquiry can result in a playful state that fosters creativity, openness and togetherness.



Connect with me on the web and social media

Website and Blog: **[Positivity Strategist](#)**

Training and Community: **[Positive Change Training](#)**

Twitter: **[@robbiecat](#)**

LinkedIn: **www.linkedin.com/in/positivitystrategist/**

Facebook: **[Positivity Strategist](#)**

From: Cassandra Sheets <CSheets@cflrinc.org>

Sent: Thursday, June 20, 2019 10:01 AM

To: Kelly Walters <kwalters@theparkwaycenter.org>; Barbara Brodock (barbbrodock@brodock.com) <barbbrodock@brodock.com>; Dan Falatico <dfalatico@brodock.com>; Laurie Flanagan (lflanagan@brodock.com) <lflanagan@brodock.com>

Cc: Brian Reese <brian@fdwcpa.net>; David Wojnas <djw@fdwcpa.net>; Trevor Wiggins <wiggins.trevor@yahoo.com>; Tplizga@roadrunner.com

Subject: Follow up

Good Morning,

Thank you all for taking the time to meet. I am sending this as a follow up summary to our meeting yesterday.

CFLR understands that what we owe and that this was an oversight on both sides. We are hoping that we can compromise as a small non-profit, this would have a program impact. CFLR has been a long term tenant and all agreed a good one. The discussion was good and CFLR gained a better perspective as to how the landlord manages and report leases to the bank and we hope that an understanding as to where CFLR stands was better understood as well.

CFLR proposed:

1. Pay rent owed from 12/18-6/19 – approximately \$9,000 by July 1st and continue to pay 13.00 per sq. ft for the remainder of the lease starting July 1st.
2. Split the difference of the money owed from 2014-2018 – total is 31,000 – split is \$15,500- CFLR will pay the split amount monthly over 3 years – approximately 430.50 per month.
3. Maintain current lease term – which ends 2023 and to negotiate a new lease at a later date.

Barb's proposal:

Extend the lease 5 years beyond 2023 and adding an option that if CFLR was assumed or out of business we could leave and they will forgive the full amount of money owed.

CFLR response – if we were to take Barb's offer it would be a better idea to renegotiate a new lease and put a flexible clause in that both parties would agree. We need to bring this forward for discussion with the Board of Directors a meeting is coming up.

CFLR did make it clear that we are not looking for a new location but the purpose of our proposal is to take responsibility of our actions ask for some support in this situation and to keep our options flexible due to the changing non-profit landscape.

Barb did ask what are issues that hinder business:

Elevator – breaks weekly- clients and staff have been stuck

Plowing issues – several falls in the parking lot

No hot water – resolved

Heating and cooling inconsistent

Asking for things to be fixed and it does not get done – door, light, leaks – (door was fixed)

We left the meeting with the following

Barb was to talk with her partners on options and whether they want to take it

CFLR will talk to the Board on her proposal and will give it significant thought and discussion

Follow up from both parties will be voiced by the end of next week.
Thank you
Cassandra