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CRITICAL REFLECTION ON PRACTICE DEVELOPMENT

Hip deep in the 'messy lowland': using fourth generation evaluation to make sense of practice complexities

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Introduction

'Code Red': imagine being faced with a **real** fire situation in a hospital… I am sharing through this reflection, using Atkins and Murphy's model of reflection (1994), my learning about engaging clinicians through the claims, concerns and issues methodology guided by the principles of fourth generation evaluation (Guba and Lincoln, 1989), to understand and learn from their experience of a complex practice process, the team's response to a fire situation.

Describe the situation including thoughts and feelings

A fire occurred on one of our complex continuing care units; the first fire ever in our organisation. I was involved in responding to the emergency, including the evacuation of our patients. It was a messy and uncertain event I liken to the 'swampy lowlands' of practice experience described by Schön (1983, p 42). Staff responses were not perfect despite our annual fire training and frequent practice fire drills, affirming Schön's (1983) assertion that staff cannot just apply theoretical solutions to practice situations. While the outcomes were positive in that no one was hurt or injured, a view from the inside suggests things could have ended differently. Leadership and coordination of effort was lacking at the unit level whilst staff emotionality at times interfered with rationality in decision making. Chaos ensued.

A unit level fire debrief was led by a senior administrator immediately following the resolution of the emergency situation. The discussion during the debrief almost exclusively focused on what did not go well. Furthermore, there was inattention to staff emotion during the debrief by the corporate leaders in the room. The tone of the session was matter of fact and down to business. I personally experienced the process as painful and observed signs of unease in my staff colleagues who were present in the room.

Finally, an organisational memo from the executive offices was issued post the fire situation advising all staff that the Centre underwent a **'small fire'** in a patient room in the main building. The memo advised that although an investigation into the cause of the fire is underway, the resulting damage is

described as minimal. I experienced the memo as a minimisation of the event and of the emotional residue it had left with staff, including myself.

It is my perception that the fire experience was made light of, shelved, set aside, put out of mind and sanitised through the traditional debrief and follow-up memo. As a practice development facilitator, I was intent on facilitating a more systematic and effective examination of the fire experience in the interest of promoting learning in practice. I used a claims, concerns and issues methodology with unit staff to fulfill these accountabilities. The good, the bad, and the go forward from the fire experience were revealed.

Figure 1. Janet Jemmison and Ray Laidlaw demonstrating a sheet slide at West Park Healthcare Centre

Analyse feelings and knowledge relevant to the situation

I felt concerned about facilitating the fire claims, concerns and issues sessions, as staff emotions about the experience were running high. In addition, I brought to the facilitation my own lived experience and emotions of being involved in the fire situation. It was important for me to address the management of both feelings and emotions, my own and others. However, the staff participating in the claims, concerns and issues sessions brought with them 'restrictive values and norms' of our organisational culture (Heron, 2010, p 55) such as the convention of managing and stifling negative emotions, what Heron (2010) might refer to as actively 'repressing distress emotions' (2010, p 55). An organisational culture that stigmatises perceived weakness (i.e. emotionality) is the most subtle and challenging barrier to staff in accessing needed support (Halpern et al., 2009). This stigma can be so firmly ingrained in the culture that it often goes unrecognised and therefore unchallenged (Halpern et al., 2009). Through the claims, concerns and issues process, staff were enabled to reflect on and examine their feelings in a comfortable and supportive way and shed their inhibitions towards emotionality. Collectively, we acknowledged the traumatic nature of the experience and the normality of our stress responses (Magnar and Theophilos, 2010).

I wanted the staff to feel empowered by the claims, concerns and issues process and not dis-empowered. Regel (2007) cautions regarding the potential risk of the exploration of emotions worsening reactions. Halpern et al. (2009, p 144) refers to the 'dance', that is the skilled facilitation required in navigating staff to self modulate the release of emotions in a healthy manner in a safe space.

There was a palpable intensity in the room during the sessions. I was worried about staff feeling exposed and vulnerable with expressing their concerns about the fire situation and the consequences of this. Much of what we were expressing may be viewed negatively at the corporate level as challenging the corporate fire plan. I was concerned that some of what we were bringing forward may be hard for individuals at the corporate level to hear. How would decision makers view our go forwards (i.e. issues) stemming from our experienced claims and concerns?

Overall, I was anxious to make the sessions as helpful and significant as possible for the staff involved in the fire situation. In a way, the claims, concerns and issues process provided a source of emotional healing for the staff. The need to work through emotional reactions has been identified as fundamental to debriefing traumatic incidents with staff in healthcare settings such as the

emergency department and in emergency medical services (Jeannette and Scoboria, 2008; Halpern et al., 2009; Regel, 2010). Through the claims, concerns and issues process, I endeavored to create the conditions whereby the staff members were enabled to articulate both their positive experiences and their concerns.

My one regret in regards to my facilitation of the claims, concerns and issues is that I was unable, due to time constraints and staff workload, to complete the issues component of the process until later sessions when I worked with staff to reflect on an aggregate of staff concerns and compose questions still left unanswered. It was unsettling to end the first set of sessions with concerns, leaving staff feeling down. The issues component which is more action focused would have been better to include with the claims and concerns components so as to end on a more positive note.

Evaluate the relevance of knowledge
Heron's (2010) theory may help me to make sense of both the fire debrief and the corporate memo as a business approach to what I personally consider 'sanitising' the situation. There is a historical organisational pattern of suppressing situations of high emotion. Staff members then get stuck in the emotional state, which becomes histrionic in nature. The potential consequence of this approach is that staff may feel cut off from their emotional state (Heron, 2010). What will likely happen is the suppressed emotions will surface in other, unhealthy ways (Heron, 2010). Heron (2010) proposes that a distress emotion is displaced by the person unconsciously into some action that is maladaptive.

Heron's (2010) feeling dimension helped me to make sense of my facilitation of the fire claims, concerns and issues. The opportunity to do a claims, concerns and issues helped staff with identification and acceptance of their emotions (Heron, 2010). This was achieved through facilitated catharsis (Heron, 2010) whereby staff talked extensively about the emotions evoked in them during their involvement in the fire situation, such as fear and anger. Through my facilitation interventions staff had the opportunity to 'reconstrue' the fire situation in that they cognitively restructured their experience creating a new perspective, thereby altering their emotional response to it (Heron, 2010, p 196).

The principles of fourth generation evaluation, a constructivist inquiry paradigm (Guba and Lincoln, 1989) guided my decision to use a claims, concerns and issues process to examine staff's experience with the fire situation. A constructivist approach to learning is an active process of constructing knowledge from within (Walker, 2001). I felt that it was imperative to capture local understanding of the experience as it presented an invaluable source of data. A fourth generation evaluation approach includes values of the participants, as well as cultural and contextual elements of the situation, which Guba and Lincoln (1989, p 48) coin as 'local understanding'.

Fourth generation evaluation has a relativist ontology. This worldview assumes that stakeholders are able to voice their own constructions of reality (Guba and Lincoln, 1989; Koch, 2000). Feedback during the sessions confirmed that the staff felt that they had been given an opportunity to have their inputs, claims and concerns honoured in the claims, concerns and issues process.

This approach differs from the traditional fire debrief where the goal of empowerment is not a consideration. The traditional debrief did not necessarily provide a safe environment for staff to speak their mind about the experience. A lot had gone wrong with the fire response and evacuation; staff were still processing what happened on many levels. Not having an opportunity to express their affective responses may have overshadowed their rational thinking in the moment during the debrief. Consequently, the set of recommendations from the debrief were lacking as I saw them. They were valid only to the assessor and the corporate lead responsible for the fire debrief.

While staff did have an understanding of the corporate fire plan, when faced with the 'messy lowland' (Schön, 1983, p 42) of an actual fire situation, many conflicting concerns arose that were deemed incapable of an easy solution. As Schön (1983, p 42) writes:

> *'In the varied topography of professional practice there is a high ground where practitioners can make effective use of research based theory and technique, and there is a messy lowland where situations are confusing 'messes' incapable of technical solution'*

The claims, concerns and issues process enabled those who directly experienced the fire situation to represent meaningful constructions to 'make sense' of the situation in which they found themselves (Guba and Lincoln, 1989, p 8). No matter what decision the staff might make in the fire situation, an untoward outcome could occur and on hindsight their decisions could be brought into scrutiny and questioned.

Identify any learning which has occurred
The primary purpose of fourth generation evaluation is a commitment to taking action based on the data. Guba and Lincoln (1989) support the idea that action is inspired and facilitated by the evaluation process. There is a moral imperative that this form of evaluation will lead to action (Koch, 2000). As a practice developer, it is my hope to see sustained and significant changes made in practice including a shift in the organisation's business approach to dealing with sentinel events such as a fire situation. Regel (2007) considers the business like nature of many organisational contexts in which traumatic events occur and the subsequent cumulative stress experienced by staff related to the impacts of this business culture.

The fire claims, concerns and issues helped us to learn about aspects of our fire experience that were not captured in the traditional fire debriefing process. The style of the person who led the fire debrief was hierarchical in nature whereby staff were essentially passive recipients of the critique of the fire response and evacuation process. The facilitation of the fire claims, concerns and issues was in contrast collaborative, whereby the staff members were empowered to disclose their true views about the experience. The claims, concerns and issues was experienced by the staff as supportive, enabling a critical reflection on the situation with others who were involved as well as an open exchange of the emotional impact experienced.

The service manager and I jointly met with the senior administrator who led the debrief session to share with him the staff's data from the claims, concerns and issues and to discuss what has been learned through this process to inform corporate items to be addressed. Through the claims, concerns and issues process, the staff were producers of knowledge about Code Red in our practice context (Reed and Lawrence, 2008) based upon reflection on their experience (Parker, 2008). He was very impressed with the process and the attention of the team to a very important issue. He recognised the investment of time in the process and was moved by the *'aha'* aspects of new understanding' for him stemming from the claims, concerns and issues data. He recognised the team for their production of knowledge that is valuable to him as a corporate leader. The staff transformed direct fire experience know how into knowledge production to inform Code Red practices, including the establishment of unit based fire plans which we are in the process of developing. The claims, concerns and issues enabled us to tap into unique knowledge gained from an actual experience. As a team, we achieved new insights and useful understandings that may help us to move towards actionable changes (Habermas, 1972; Fay, 1987).

Conclusion

This reflection demonstrated how useful it was to use a systematic tool, claims, concerns and issues to examine a complex 'messy' practice situation. As a facilitator, I learned a lot from this experience about acknowledging and working through emotions, my own and others. Heron's (2010) feeling dimension helped me to make sense of my facilitation. It is an important aspect of facilitation that I intend to explore further.

Disclaimer

The views expressed in this publication are our own and do not necessarily represent those of West Park.

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