

SUPPLEMENT TO

SOCIALLY CO-CONSTRUCTED TRANSFORMATIVE SELF-REGULATION IN
OCCUPATIONAL THERAPY: AN IN-DEPTH ANALYSIS OF THE ROLE OF
GOAL-DRIVEN GUIDED REFLECTION IN A MAN WITH BIPOLAR DISORDER

by

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Coded Guided Debriefing Interviews

The following pages present the actual coded guided debriefing interviews. The comments from both coders appear on these pages. They were scanned as they were color-coded; codes and descriptive analyses have not been altered to fit page margins. The layers of analysis are evident in the range of comments appearing in the descriptive analysis.

T1: Today's date is May 2, 1996. The time is 1:26. I'm therapist E, and with me is patient 001. We're starting a review of the treatment session held yesterday. The tape did not record yesterday, so we're going to review yesterday's session before we begin today. Patient 001, I'm just going to ask you some questions that might lead us on to thinking about yesterday's session.

Today, you were working on coming together a procedure for working with customers who might be interested in buying your services to look through the Internet. So, how was that (inaudible)?

P2: It was okay. I think I got some insight into what needs to be done. I think (inaudible).

T3: And, what we did was try to use some experience you've had in the past to take some materials you had already pulled from the Internet, and that I had reviewed, and tried to work with me on the customer (inaudible).

P4: Exactly. (inaudible) as a test, because....

T5: Yes. A pilot test, right. So, when you think about that overall process, can you tell me a little bit more specifically what we did?

P6: Well, we looked at some of the materials that I was previously able to pull off. We talked about how the search might be narrowed, and make the use of the time more (inaudible),

and I think we talked about how we might come up with some tools to help focus on what the real job is about.

present doing of task 2 para 1 (1/1/2) future customer role levels

T7: So, it was almost by our interaction that we were able figure out what you needed to do to keep developing this as a small business?

P8: It was exactly by our interaction.

therapeutic relationship is the therapy / therapeutic goal

T9: Now, before I go to the next question, I think what I'm going to do is see if this is really working..... (pause)it seems like we just need to get this a bit closer. Now, another aspect that we talked about yesterday was the environment, and how the environment can (inaudible) as an activity. And you had a lot of reactions to that in terms of what was helpful or what hindered your working on the computer yesterday. Can you recall some of that?

refers to monitor

request reflection

P10: Sure. I think the point that was important for me was that I view this as something that would take place within extended chunks of time. And, therefore, I felt that the environment needs to be more comfortable. I think some of the things that I was talking about was that there needs to be adequate desk room to put papers down. It should be a fairly quiet environment. For me, that would mean some background noise, but not conversation, not people background noise, just something to kind of mask those

T11: And do you usually do that at home?

regulation of task/environment is a way to regulate performance

P12: Yes, usually I'll turn the TV on behind me. And just not (inaudible), just a constant blabber of a movie, commercials, anything.

T13: So, the space is one thing?

P14: Space...

T15: In this room, how would you describe....

("BREAK" IN TAPE)

P16: It's very confining. It's very full, and this is not the kind of environment that I would prefer. I think I would prefer some more space. As I think I indicated, I like to sometimes step back physically...roll back from the terminal to look at it. And, so I need some space to kind of roll the chair back. I think in terms of equipment, I think it's important that the desk or table height is at the right place, and the monitor is at the right point, the chair at the right point...(inaudible).

combines description and analysis around form

T17: That's something we said we'd try to check today. Can you talk about this monitor a little bit?

P18: Yes. A couple of things I noticed about the monitor is, a) this monitor is not displaying the image upon the full surface of it... it seems to be cut off. And, we talked about the possibility of having some technician come to take a look at it to see if it could be

adjusted. But, furthermore, I'd want a very large monitor that is appropriate for this kind of task because when I sit at a terminal when one sits at a terminal for an extended period of time, it really is less stressful having a huge image, and I thought a 17-inch image would probably be okay, perhaps a 20-inch image, except both monitors would get to be expensive, but a 17-inch monitor, or quite a bit larger than this. And, a high quality monitor with good resolution.

T19: Another thing we mentioned was the actual power (?) computer itself.

P20: (Laughs.) Every time we turned it on, we seemed to have more failures, and there seems to be something intermittently wrong with it, and that's extremely frustrating, because if I get in the middle of something, and it locks up, we have to restart the system, and then that could take 3 or 4 minutes each time. More important than the time is the fact that I lose my concentration, so I would certainly expect to have a system that doesn't fail quite so often.

T21: So, you have been also evaluating what equipment you might want for yourself in the future by trying out some of this different (?)

P22: Yes, exactly.

T23: The other thing that happened yesterday at the beginning of the session, there was a bunch of people out celebrating or making noise, and I remember we shut the door, and is that something typically that you would need to distance yourself from, or...?

starts to talk
about team
+ engagement

present
future
present

ask about
people
in environ-

not interpersonal
relationships yet

P24: I would. I would. I think that goes back to my idea of what's quiet. My idea of what's quiet is background noise, but not people conversing. Because I tend to get distracted by that.

T25: Well, you know one thing that, as (future) we look forward to this business evolving for you, one thing that (future) might come up for you is challenging people that you're working with, people that might be more difficult to work with. And, I was wondering... I was noticing sort of our interaction was we were going back and forth to work with the screen, and as it evolved, I ended up being able to respond exactly to the screen quickly in language that you had taught me. And, I'm wondering if you could say something about working in this relationship versus what might occur with others?

P26: I think that my test, or pilot customer, was an ideal candidate in that she was knowledgeable, cooperative, had a good spirit. But, based on some prior experiences, there are people who get quite, I guess, nervous sitting around waiting for something to happen, and if a customer is doing that, that tends to throw me off balance. And, so, I think I need to learn some ways to deal with that kind of situation. Appropriate responses. Sit down, have a glass of milk, or something (laughs).

T27: Well, you know, one thing that happened yesterday is that there was a point where I got excited about the content of what I was looking at. And, that presented a diversion for you in terms of what you were trying to keep your train of thought going on the Internet, and what the next question would be for the Internet. And, I was noticing that you

co-creation
language
task
for
co-creating
metaphors

*
client
state
therapeutic
goal
after self assessment
reflection
on past
engagement

handled that by structuring the environment a little bit. Remember you said, "Wait a minute," and turned the pages over, and used the box over there for a desk, and sort of guided me to asking certain kinds of questions and.... (inaudible)?

P28: Well, that was fine, in, again, that the customer was very cooperative. But I can imagine that there are going to be circumstances where the customer is not going to want to stop his or her thought process, and is going to want to pursue something that is tangential from what I'm pursuing on that customer's behalf. I think we talked about this, and it's a up to me to find some ways to calm myself internally so that I can deal with it, and then to recognize that if the relationship is only on a per hour or per diem basis, that's what I'm being paid for, so maybe that's okay.

T29: And, I think another aspect is, what if somebody doesn't respond to your guidance, and it's somebody that you really don't feel you should work with?

P30: Well, I guess it's up to me to try to terminate that relationship in some cases, as pleasantly as I can do it.

T31: I think some of this discussion about relating to people is something you've talked about in describing past jobs. you know, as sort of an area to keep looking at, so maybe we can keep looking at that.

P32: Exactly. Maybe we can get some difficult people, and try them out....

this is a firm

info is incomplete

client reinforces their goal

discussing and interacting with client about their goal

then up goal comes out of client experience

T33: (Laughs.) I could act difficult.

P34: No, not acting.

T35: They've got to be really difficult, right? We might be able to figure out somebody. I don't know, but maybe we could.

Well, as we think back to yesterday's session before we get started again, is there anything else that you recall us talking about that I might have neglected to bring up?

P36: I think we've covered the high points. We talked about structuring, we talked about... one of the things that came up during our session was that we might develop some questionnaires or forms to kind of guide us through....guide me through the interview process. And I think there has to be an interview with the customer. you generally want what the customer's general objectives are, and how that customer wants to work on it, whether it be in person, side-by-side, or whether it be over the phone or fax, or whatever. Just to have a clear understanding so that there are no misunderstandings a little bit later on.

returning to discussion of form

T37: I remember that coming up as we were working together, and that we were both trying to figure out what the other one needed. And, I think you said, hey, let's do some guidelines, and then that might be another way for you to structure how the person interacts with you so (inaudible) were doing anything that you can't produce right at the moment.

negotiation of disagreement with interpretation

forms facilitate overall task goals

P38: Right. I think the point I was making was that a lot of things can be produced at the moment, but in order to do that, it derails the rest of the process.

client has task goal as focus

T39: Right. The other thing I remember you discovering yesterday was the timing. you know, we had worked for 15 minutes, I think, and then started talking. And, I think your comment was that 30 or 40 minutes might be good.

P40: Right, I think the analogy I used was perhaps the psychiatrist's hour of a 40-minute hour, or 45-minute hour with a structured period of time where we would take a break and maybe have a cup of coffee or just to in some cases maybe get a cigarette, or make that personal phone call that the customer was sitting there itching to make. you know, beepers go off... "I've got to return that"...and I think that's important, that maybe as part of our structure, it's a side-by-side, "Please turn off your beeper and your phone, and let's concentrate on this for the next 40 minutes." Then, you give that person a chance to return that call.

T41: So, as we're going through, maybe that's a real important thread, because it has to do with the people nature of the work. you know, how to come up with a way to design it so that it's least difficult for you.

networker #6 different words

P42: Well, not just that; I think so that it's most beneficial to the customer. I can imagine that if a session is too chopped up with extraneous things, that customer is not going to walk away satisfied. And, the way to get a satisfied customer is to get someone who really understands what's being done, and how it's going to benefit the customer.

client has difficulty addressing (people) or task + therap goal 1-8

T43: Then, they can see some results, so that (inaudible).

P44: Yes, if it's chopped up, I think what we wind up doing is having to repeat the last 3, 4, or 5 minutes of it, and then it becomes unproductive.

T45: I heard once that when you're interrupted in something, it takes you 15 minutes to get really going in it again. you can't just pick it up...

P46: Well, imagine if we're interrupted every 5 minutes, and it takes us 15 minutes to get going again, we're behind 10 minutes....we're minus 10 minutes...(Laughs)

T47: Okay. Do you think we sort of repeated pretty well what we had done yesterday?

P48: I think we've covered it.

T49: Okay. I'm going to close now, with... the time is now...

P50: It's 1:41.

T51: 1:41. And this therapist, code E, is ending the treatment session review with patient 001.

T1: Today is May 2nd. And the time is 4:02. I'm therapist E, and this is patient 001. We're starting the review of the session that was held this afternoon between 1:30 and 2:30.

Okay, today, Patient 001, you were doing a little bit more on developing your small business, and you were focusing on guidelines that you might use to help define the nature of the relationship between the customer and you in your business. How was working on that for you?

P2: It was fine. I think it was productive.

T3: Could you tell me more about what you did?

P4: Well, what we did today was to identify a lot of the questions that have to be asked prior to actually going to work. We tried to identify what some of the possible considerations are in terms of the relationship that might develop. We put it down on paper, which I think is those are the highlights.

T5: As you were working, I was noticing that you would go back and forth between different sections. Can you talk about that a little bit?

P6: Yes. Sometimes that's not as productive as it should be. I think the fact is, when we work on computers, we're working on usually 24 lines at a time, (?) maybe being less because of some of the bars that may be on top or bottom. So we might be working on 24 lines, but it's less than a page, so that requires scrolling back and forth. I think it's a little

client more
reading address
therapeutic
goal

future

levels -
2 computer
screens
task also has
levels

bit counterproductive. Also, the inability to look at more than one page at a time, I think, is not productive as it would be ...as it could be.

*Me Tagline
Multi. level
purpose & analysis*

T7: I noticed you made the type font larger so it was easier to see while you were working on it.

P8: That is correct. (Inaudible)....displayed less data on the screen. So, I guess it's a combination of a larger screen would mean perhaps actually more data on the screen, plus you could see it. Although theoretically the small screen can hold as much data; it's just not visible. And so the larger the screen, the more visible the data. But, again, the other issue is being able to look at two documents, two pages, side by side, which is something we typically do in, quote, the real world. Then, of course, what we did at the end was we printed it out so that we have the pages, and I think that's necessary, even though there are some people who say, well, we shouldn't have to print paper if we have it all on the computer. The goal was stated a number of years ago of the, quote, paperless office, and I think this is an example of where a paperless office would not function as well as it could.

*Combination -
bullet combine*

T9: Right. I would use paper, too, (inaudible). One of the things that we take a look at each time we're sitting down in the environment is if there's anything that was helpful or that was hindering about the environment.

P10: Well, I think it was warm today. It could have been cooler. Although I don't think yesterday we talked about that, it was obvious today that climate control could be an

important factor. I think I function well when there's fresh air as opposed to stale air, and probably a little bit cooler as opposed to a little warmer.

T11: We have the (?) again today as I recall, right?

P12: Yes, we did.

T13: And then I remember you took off your jacket. I kept mine on, so I was getting warmer and warmer and warmer. Trying to (?) the towels off of that air conditioner, and got ourselves a little air. A little too late in the session. How about any noise or lights you didn't approve of? The chair height today? Just any of those things....

P14: (?) Because I adjusted the chair before you came here. But, then, normally I would have (?).

T15: We had the situation again today within an hour, the computer went down twice, right? Once at the beginning when we started, and then at the end, which made us stop. We were going to do some other things, and (inaudible).

P16: Well, we had a 15-minute hour.

T17: (Laughs.) One of the things that seemed to come up this time during the session is that we were both creating some language to help guide how you end up relating to customers.

doing in
present give
goals for
future

P18: I think we were ^{present} discussing terminology, and I don't think that in my mind I arrived at a decision as to what the correct terminology should be, and I don't mean grammatically correct, or dictionary correct, but correct in terms of how other people would understand. And that ^{future} points out to me the importance of selecting the, quote, right, unquote, word to talk about something that someone else cannot understand. I think it ^{future} puts both of us at a disadvantage. ^{future} It's difficult for many people to say, "I don't know what you mean; I don't know...what is the web?" So, it's important to use language and terminology ^{future} that others can easily understand.

T19: you know, when we were working on that, I found a couple of ways that we approached ^{review levels - ask for 2 on engagement} it. In the beginning, I was pretty quiet, and you were putting your initial thoughts down, and ended up coming up with some categories, you know, that we ended up fleshing out later. That was one way we worked together. Then, later on, we started putting in my thoughts, your thoughts, around the same topic fairly simultaneously. And, did you have a preference, or what did you think about how that happened? ^{this category is same as scaffolding}

P20: I think (inaudible). Not too many people. And one of the questions that I asked is, who will be present? And I guess one of the ^{future} (unspoken questions) is, how many? If it's too many, it would be very distracting and disruptive. ^{what is seen what is hidden}

T21: In the very beginning, I was consciously trying to be quiet to allow the thoughts that you had to go up there, and not feeling like I was guiding it along certain (?). Did you feel that I didn't care, or that I wasn't....

P22: Oh, no. No, that was fine.

T23: That was okay.

P24: Because your attention was there. your physical attention was there, and that's important, but body language certainly sends a lot of messages. So, I think it's important to be tuned in in an in-person situation. It's important to be tuned into the body language.

T25: That came across to you even though you were busy putting up your initial thoughts?

P26: Because of the seating situation, it was easy for me to be looking at you and also what I was (inaudible) looking at the terminal.

T27: Now, when we were working together, there was a couple of times that I was aware of that I would add a thought, and you would type it in, even though you might have had one of your own that you wanted to put up there. How was that?

P28: Well, that's fine, and I think that that's great to do that because things don't get lost. With talking about myself, I can type things faster than I can write things, and so putting them in that way is wonderful. Also, as you probably noticed, I don't pay too much attention to the spelling or any of that stuff, or the punctuation while I'm doing it. So, I can get it in real fast. When I'm writing things, I know that if I don't spell it right, you have to rewrite it, or go back with corrections, although maybe it's not possible because I may have to add too much to a word and it won't fit in the space. So, using the computer in this

instance, or word processor, which (?), is a very effective use of my time, particularly since often I have lots of thoughts going around. I can get more of them out.

T29: Did my coming up with some things to put in make you lose track of what you had on your mind?

P30: Possibly, but I don't know how else it could have been done.

T31: Because I was noticing, one time in particular, I felt that I had jumped in while you were about to put something down. And you ended up putting my thought down, and I wondered if you had really lost yours.

P32: I don't know; I can't tell you.

T33: If there was somebody different than me sort of jumping in with things, how do you think you'd handle that?

P34: It depends on the person. I think it depends on the attitude of that person. Is it a positive jumping in, or is it a negative jumping in? Is it an irritating or irritated jumping in? Or is it a mutual effort being expressed?

T35: So maybe some of the situations with other people that you've had in the past might have felt more like competition or somebody trying to dissuade your ability to do something?

use past & present to speculate on future

reflect on past

P36: Confrontational, is how it sometimes comes across. And, it may or may not be intended, but it comes across as confrontational sometimes.

T37: So that you're suddenly faced with another topic that you weren't even trying to address, and you're in a debate about that when you had something else to put up...

self-regulate to achieve goals

P38: I think there's another part to that, and that is, while I'm doing something, to have someone at that moment in time saying, "No, no, no, no, you don't understand," or some words to that effect, disrupts my thought process. So, that's why I find it difficult to go through that (?).

T39: Would you have felt comfortable saying, "Wait a minute, I just want to get this one down; can you hold it?"

P40: Possibly, it depends on the...

T41: Right. So, if it was something burning....?

P42: Um-hum.

T43: (I was noticing myself) wanting a pad of paper to jot down thoughts I was having (while you were thinking....)

idea of immediate reflection
as scaffolding; looking back as
learning reflection

P44: We talked about that yesterday, I think, having the paper and pencil available, in addition to the computer.

T45: Right, for both people. Because, then if you can get it out, then you don't need (?).

as metaphor
more integrated
in training
there are more
frequent
double coding

P46: I asked you about something earlier, and that was, how do we... on this particular model, how do we flip-flop back and forth between two thoughts, really, on the computer? Or, how do we get two screens showing concurrently? And that's one of the uses of it, and one of the reasons I was asking, but we never got a chance to actually go through that because the computer bombed out at that moment. But that's how I can sometimes be more effective by having two documents on the screen at the same time, and then it's easier to go from one to the other. Or to be looking at the result, and as I'm looking at the result on the other side of the screen, to be putting in some comments about what it is or how it should be done. And that's what I had in mind when the computer bombed out. So, those who are listening....

T47: (Laughter)...It's interesting that in both sessions, we have stopped because of the technique, the modality, not because you were ready to stop, or....today it turned out to be time; you know, you're group is starting, so.... But we stopped at a time that the technique was not (inaudible) for you to work on.

P48: I think it's not only a waste of time, it's a little bit jarring to have that done.

T49: Yes. It takes away your personal choice (inaudible).

expand on emotion -
take to another level

we present to analyze past
P50: But, again, it's relative. I think if we go back 10 years, I would have been thrilled to have those few interruptions. But, I'm not today, because I've tasted better.

T51: Yes. It sounds like next time we can try the two-screen thing. I think that would be better.

P52: I think that's a great idea.

T53: And then maybe we could also take a look at the guidelines that you've come up with and maybe keep them by our side and see if anything jumps up as we're going along.

P54: I have a pad available, because of things that cannot go down on the screen, for whatever reason. It's a good idea to just (inaudible).

T55: Anything else that we need to get on the tape here?

P56: I think that's about it.

T57: All right. The time is now 4:16, and this is therapist E, ending a session review with patient 001.

2-1

T1: Today is May 6th, and the time is 12:27. I'm therapist E and with me is patient 001. We're starting a review of the treatment session just held. Today we're working on putting two files onto the same screen, the net (?) and Microsoft Word.

P2: Correct.

T3: Can you tell me what you did, and how it was for you?

P4: Yes, what we did is we brought up one application—Netscape(?), for example—looked at it once it (?) on the screen, and then we essentially made Netscape into a half of the screen, so that the right hand of the screen was displaying Netscape. At that point, I initiated Word, and I changed the dimensions of Word once it loaded so that Word occupied the left side of the screen. Then, the next step was to call up something—in this case, we called up a reference (?) in Netscape that had a name and address in it. And by blocking the name and address, I was able to copy that into the Word document, and therefore we could flip-flop back and forth between the left side of the screen and the right side. And even though they're different applications, we could copy data from one application into the other.

metaphor of level
- different screen
- different view
- aim is to
- give user
- which

T5: Which is amazing.

P6: Yes.

T7: Including, I was going to say, even the Hypertext, which has a certain code in Netscape to go further for further information, and copy over as regular language.

P8: Right, but it does not copy as I would (inaudible).

T9: Right, it's amazing.

P10: Next year.

T11: (Laughter) When you take a look at what was happening in the room today, how was the environment for you, and the equipment, and...?

P12: I would say that the environment has not changed much since we've talked about it (?).

working "open" parallel separate understanding of goal

ongoing

The system did continue to fail, and so that's a little bit frustrating. And the system is slow, incredibly slow, particularly when we have two applications loaded, which brings up another thing. One of the difficulties that I had was ultimately trying to print out the finished document. Or to save the document, and that was not possible because there was not enough memory in the computer. So, it certainly just gets back to the physical attributes of the system, and making sure that there's more than enough memory (inaudible). And, otherwise, the environment was pretty much the same, except it's more comfortable in terms of the temperature; it seemed a little bit better.

T13: Yes, and we worked this morning with the door open, as I remember, because there weren't a lot of people in the corridor, and then shut it once people started (?) for lunch.

One thing that seemed to happen today that's different from our last two sessions was we saw some problems with the printer. I called up ^{computer expert} Veladia(?) during the session. We brought in some consultation about how to maneuver the hardware and software here.

We still (?) in the midst of what you were trying to do. And, at the same time, we were also talking about a PC that I've recently purchased, sort of all these levels of things happening at the same time.

metaphor
strategic
introduces
discussion of
things
pulls
client unaware
blending
- side by side
- task / other
goal

P14: I think this was good in that it took the focus away from the immediate problem. Or the delay, and going back to something we had talked about previously, we're working side by side. It's very anxiety-producing to not have anything happen. So, perhaps having some appropriate conversation available can ease that situation.

T15: It seems to me that we were, if I take this as [what might happen if you were in a consultation position with someone else, there might be a situation where they would have to call their boss, or call a third party, and to critique what was on the screen, and which area should they choose next to go into, or they might have some other thing going on with themselves which you're interested in, and have some expertise to share. So, do you think this kept you on target? Did you feel like these are billable hours? What did it feel like?

P16: Well, billable hours, then, yes. On target, no, but it didn't take me off target. And what we were talking about didn't have anything to do with the target, but to be candid, it wasn't anything consequential, so it didn't matter. And I guess that's the important thing

Sich et

is that there will be times that ^{future} there will be delay and it may be a delay in transmission, in ^{levels} getting the data. It's probably a good idea, rather than focusing on the delay just to chit-^{adaptation} chat about something that isn't terribly important. Because you don't want to get into a ^{in front} long, drawn-out conversation, but rather a "Gee, it's a wonderful day" kind of thing.

T17: But that leads me to think that there might be, while you're doing the initial interview with people, an opportunity ^{levels - new} to get to know them, to establish some sort of rapport, ^{relationship} Because we're coming into these knowing each other a little bit, you know. And maybe ^{customer relat} that would help if there were some of these down times, or frustration times.

P18: I agree that that's an opportunity to get a little better understanding of whoever it is I'm dealing with, but I think ^{the best time} to establish that rapport is at the very beginning, not while on-line. I think ^{the best time} is during the initial interview to just find out about what makes that person tick.

T19: So maybe there's some questions to add to your initial sheet that we have downstairs, actually.

P20: That's a possibility. I might my gut feeling ^{negotiating} is that that can never be scripted. That has ^{levels of} to just happen on the fly. ^{understanding}

T21: Right. But it has to be part of your agenda.

P22: Yeah, sure, I agree with you.

T23: Which I hadn't thought about...

P24: ^{future} For some people it might be something as simple as, "Tell me a little bit about your ^{levels - his past} business; how did you get into this? I'm really curious as to how did you get this (?)" For ^{was} some people that's okay, ^{to anticipate} but there are people who don't like to be asked that kind of a ^{future} question, in which case it might be something like, "How long has the company been here? Have you always been at this address?" Again, ^{do it as an ice breaker} I do it as an ice breaker. It may not ^{stated in present} be anything terribly important, it just (inaudible). ^{refers to future}

T25: you know ^{shared past} (one of the things) that we have had going along the way is your expertise is something that I wanted to know more about. So, ^{future application} maybe there's a way of finding out something that that person needs to know from you, or that they are particularly skilled at. Because then ^{future} you could compliment them on what they're doing well at, and you take a ^{future} learning lesson from... sort of that shared learning thing. I think that this helps with the rapport.

P26: Possibly.

T27: Okay. I think I've asked you all of the questions on here, so... We haven't really planned what's next. Today we didn't have (?) as much as we have had other times.

P28: But we did something. I would think that one of the next things we might try would be to get a suspect in here. But not someone we've spoken with before, someone we have not

spoken with, not (?), but someone, so to speak, someone we kind of pull off the elevator, and get that person to tell us a little bit about his or her needs, and see what is it that that person needs... that I could help them with. I was careful with that, because I don't want to say I've been supplying. I don't know that I can supply anything, but I can help.

T29: Right. That's good. Well, why don't I put some feelers out? I could announce it at our staff meeting, and also talk to maybe some of the (?) since that's one of the populations here.

P30: shared future It would probably be better not coming from your staff. And I say that because your staff is too professional in dealing with this kind of a situation.

T31: Okay. (Laughter)

P32: present We want a real life situation, and it might be a doctor who's got a need, or a request for some information on a specific topic. It could be a nurse, it could be a nutritionist, it could be any one of thousands of people around here. But I would say not in your area.

T33: Now there's two aspects to this. I could see you taking somebody that you know to try out a new topic, like ~~Medicine~~ ^{nurse} versus taking someone that's a new topic and a new person.

he sees an interpersonal skill to his task & wants to practice it

present goal of practicing interp relations attains his awareness of therapeutic goal

P34: I think new topic, new person is more appropriate because what I'm trying to understand here is whether this is viable, and I think someone I know is going to bend over backwards to make this easy. That's not the purpose. It would be nice, but....

combines future business venture with interpersonal goals

T35: All right. And, then the other part of the dynamic is that I'd like this to be part of the computer study, but I think what needs to happen for your goal is that you need to be alone with the person.

P36: Absolutely.

T37: So, maybe what we could do is interview you afterwards, and then see what happened in the session, and then just do the regular interview (inaudible).

P38: The only other possible is that maybe we could tape the session.

T39: Yes, we could do that.

P40: It could be an audiotape, or even videotape. That would be okay. Then we can critique it later, as long as the recording device is (inaudible). That would be, I think, a great way to approach (?). Let's find a prospect....suspect...victim, what have you.

T41: (Laughter). A person who's going to get a beautiful benefit.

future application

P42: Possibly. See, that's why I say I don't want to provide anything more than assistance.
Because it may not be possible to really do something positive for someone.

T43: On the other hand, they could be so inspired by what's out there (inaudible). Okay.
Anything else about this session we need to...

P44: I think that's it.

T45: The time is now 12:38, and this is therapist E, ending the treatment session review with patient 001.

Session 4

T1: Today's date is May 8th, and I'm therapist E, and with me is patient 001. We're starting the review of the treatment session just held. Okay, today, you were working on pulling together the computer table, first of all, but then, let's focus on the aspect of interviewing the customer. How was working on that for you, and can you tell me what you did?

P2: Well, I think it was okay. A little bit strange in that it was somewhat of an artificial setting. But, what I did was, first, try to spend a moment just to get a little bit of rapport, and we introduced ourselves, and then we talked about the customer's background a little bit, so that I could see where he fits in, and it was apparent that he has a great deal of background in terms of both using a computer, as well as using the Internet and searching for information. Then, we talked about the specific types of information that he could get and requires, and what his suggestions were, in terms of the search routines. We identified a number of them, and set a plan in place to try to do that for him. And, we established a follow-up (?)....or what I think is probably a realistic (?), so that's my game plan, to go forward with that. One of the really impossible questions was to try to establish a budget, since this is a not for profit installation, and he has volunteers who would normally work for him and do not cost anything, so it becomes very difficult to understand.... (?) myself, to understand what the effort is worth. And that's a critical thing, what is it actually worth?

He did acknowledge that having some of this pulled together for him would certainly free him a little bit, and there's got to be some value to that time, but again, I want to

Client's own length greatly increased

working with clients to evaluate future role

present anticipated future

present + future

parallel present and future customers

4-1

client evaluation
future 2 roles value
self vs other

emphasize that the budgetary aspect is not possible to establish right now. So that's pretty much what we did.

T3: So maybe the purpose of this one is going to be the customer relation aspect, and then we'll need somebody from somewhere outside for the next level, for the budget.

P4: Well, I think that's true. And, outside really doesn't have to be outside; it could be inside, but someone who has a budget. Someone who has a budget for, let's say, consulting, or for outside services. Someone who is going to look at his budget or her budget, and say, "Well, I only have a hundred dollars in my budget for all of these services, and this is only worth two dollars on that (?)," or whatever the numbers are. So, we need someone who would be realistic, and (my suggestion is...and I can't find that person)...but my suggestion is that if you, or whoever it is who finds that person, that that person not be told the full story up front. That that person believes that he or she is going to be asked to dig into their pockets, or in their budget pockets. Even though that won't happen, we want them to believe that so that they can give us a real number, as opposed to an imaginary number.

client still
business side of
double agent

T5: To really evaluate, yes.

P6: That's, I think, one of the ways in which I can determine whether this is really a (?).

T7: So maybe this experience is going to be doing a couple of things. Not the budget part, but it'll be doing the stuff about working with different people, and the rapport part, and

principle therapeutic goal not future

multiple goals
simultaneous
but present

the personal relations part, and then also, the gauges that we were talking about, how you hone it down. The back and forth with the person, and what works best.

P8: Precisely.

such a clear affirmation. Not clear though what is being affirmed - what level

T9: Did you get, from working with this person, sort of a theme of what his underlying needs were?

P10: I think so. But, again, I don't feel that I would really know that for certain, until we have a follow-up session. And, that's my opinion. (Inaudible).

*clients' analysis
also has
to be
regulated*

T11: So, you're going to be away for a bit now, and then coming back on Monday.

P12: Well, I'll be away just really for a long weekend. And I'll work on this next week, and then, (inaudible) will get together a little over two weeks from now, which fits into his schedule. And that's fine. Again, I have this feeling that he is being completely realistic in his time expectations, but other people might not be quite so realistic, and that's going to be a challenge that I'm (inaudible).

T13: Now, the "realistic" is in terms of how much lead time he needs, and how much time to turn it around?

P14: When he needs to have his product.

T15: Do you think other people will say, "I need it tomorrow?"

P16: Oh, I think so. My guess is that many people will not ask for help until they're desperate, and when they're desperate, it's because they have a meeting or a report or something that was due three days ago.

T17: Right, yesterday, yes (laughter).

P18: And that's when they need it, so they'll need the results (inaudible).

T19: So, maybe when I look into the next case, we need to find something that's urgent and (?).

P20: Well, I would say budget, first. Urgency, second. We don't need to deal with all of the situations at the same time, not right now.

T21: Now, how would the.... you were working with me as a female before; how was it working with a male?

P22: It doesn't matter. I'm really not chauvinistic.

T23: And, we were...before you went in there, we were (?) to problem solve, and doing a lot of physical activities putting up that table, and dealing with frustration, and ... how was that changed from that kind of activity to (inaudible)?

P24: It's a totally different experience.

T25: Could you make the transition okay?

P26: Sure, no problem.

4 overlap of description & analysis -

T27: Were you thinking, while you were finishing up the table, about how to frame this, or did you just walk in and start to...

P28: No, not at all. No, I really tried to concentrate on what I was doing.

T29: So, then, you felt comfy?

P30: Reasonably.

T31: Now, you haven't seen *Physical Therapist* Charlie before, have you?

P32: I've seen him just in the hallways; we never even said a word to each other.

T33: Okay, so he's like a near-stranger.

P34: I had no idea what his position was. I had some idea that he worked in this area, but no idea at all as to what his name was, what his position was, what his requirements were. So, he was a semi-stranger.

T35: Okay. That's been our goal. So, it seems like, what's next? We've got brochure development idea that we can work on. We've got things you're going to retrieve for a customer. And, we could sort of flesh out this trouble-shooting thing as we go along, and come up with what the problems are, and try to deal with getting some answers. (?) some people. I want to say, Patient 001, that the frustration that you're dealing in the technology is frustrating to me, too. you know, it's very hard to be trying to help me with this project, and have the concrete tasks to work, and then be stifled time after time by the technology. So, I've (?) called up our computer person, so I can certainly understand the frustration.

P36: (Inaudible). Well, getting in the real world, I would probably handle the technical problems a little bit...

T37: Uh-huh. Solve them yourself?

P38: I might do that, or I might call in outsiders. And, again, this would be using some of my budget to solve these problems. And I know that those things cannot quite so easily be done here.

T39: (inaudible) for sure. Okay, the time is now 11:32, and this is therapist E, ending the session review with patient 001.

Session #5

13 min

angry
then able to
collaborate

T1: Today's date is May 13th, and the time is 5:10. I'm therapist E, and with me is patient 001. We're starting the review of the treatment session just held. Today you were working on putting up the new Netscape program onto the new IBM computer that we had in the room, and trying a little bit of setting up of bookmarks and getting this thing set up. So, how was that for you?

P2: Right. It was fine, fine.

T3: Can you tell me what you did?

language of scaffolding
language of metaphor
P4: We were just trying to get some different bookmark files in and out of the computer (inaudible), and this would be a good way to work with multiple clients, to be able to set up multiple sets of bookmarks.

levels - 2 programs
on screen

T5: And the idea is that somebody would have bookmarks on a floppy that you then insert, or...?

P6: Or it could be on the hard disk, but somehow just to be able to isolate one client's needs from another's.

T7: So, you make the folder in the client's name or something?

P8: Sure.

T9: Now you have made some of these bookmarks on the other system here on the Har-Mac(?) system. Now, do you do the same setup over on this machine as you have here?

P10: No, they can be transferred.

T11: By saving them onto a floppy, or...?

P12: I think so. I think so.

T13: You've got to try it, right? (Laughter)

P14: I haven't figured out how to get them off the Mac, but I don't see why they couldn't be saved.

T15: Well, with this new computer, also, we were trying to locate a word processing system that we recognized, and...

P16: And we don't have one.

T17: Right, and that's what we fooled around with last time, was trying to transfer from Netscape to file, so we're in some of the early stages here in this new PC, trying to figure

not interested - not important issue?
or
has no answer yet

not just machine
what he can do with
the machine
after he presents a separate
his actions from the
equipment

5-2

out how it actually works. When you take a look at the environment today, how do you think it was? Was there anything that was helpful today, or anything that hindered you?

Change Subject

P18: It's quite a bit different than it was a few days ago. A, the layout of the room is much better, and it's less chaotic. And I think, in retrospect, the other layout just seemed chaotic. This seems more organized, which for somebody who's a maverick, I think it's strange, but I like organization. It's nice to have a somewhat organized physical environment. We have a printer today that's actually functioning properly.

T19: We didn't have any stops today.

this is his major goal - to see what a task session can feel like

P20: No stops on the system. We're using the new IBM system. And, it seems to be working well, and also, a couple other things, this system is faster. (You may have noticed) the response time is much faster, and so that aids productivity, but it also limits the frustration level, and that's very important, because you're spending a lot of time in front of the terminal. And, last, but not least, the image on the screen is considerably larger. I would guess it's 30, 35 percent larger in square inches. And, it seems to be a nice, crisp image. So, that makes it easier, too, to sit there and look at.

levels of analysis equivalent / self

T21: So, a little bit better technology, finally.

P22: (A little of this, and a little of that) and you put them all together, and it's a lot.

T23: And how long have you been here now, waiting for this?

P24: It's been a few months.

T25: Yes. (Laughter) Well, I noticed when you were working on this, you were really whipping from one concept to the other, trying to put in this bookmark, to try this technique, to fool around with it. And, do you think that was part of the technology, or do you think that's part of how your mood is today?

describes self & how it affects performance

P26: It's part of the way I do things. I'm a little bit scattered. And, that's me most of the time. My thoughts are in many different directions.

T27: Well, you said also that you felt like you had a lot going on. Do you think that influenced your productivity in any way, either helped or hindered, or...?

P28: No. I think it may have, but I don't perceive it in any way. That's normal for me.

T29: Yes, I didn't notice it helping or hindering, but I was just noticing that you mentioned it...

P30: No, I just...

T31: The other thing, from the beginning vantage point of getting on the PC, we spending some time calling up the computer consultant and getting the correct password and sort of starting off with a little bit of our old frustrations.

P32: Right.

T33: So, (once it got going) it was probably a relief to be able to maneuver in it. Now, in this new system, you were trying out some new things, because on the PowerMac, you're familiar now with how to quickly get into Netscape and find something. How was working on the two machines?

P34: I think that the PC is a little easier. I think Mac technology allows you to do some applications better, but for the kind of thing that we're doing, I think the PC will probably do it better... easier, I guess is a better word, not better, but easier.

T35: Were you problem-solving differently with the PC than you did with the Mac when you (first) were setting it up?

P36: I don't view it as problem-solving. I don't think there were any problems, per se.

T37: I'm talking about finding the Alta Vista, finding the...

P38: No, they're equivalent. There's no significant difference.

T39: So, even though the language might be slightly different, it's still sort of the same process, of how you thought through it.

P40: Yes.

Change Subject

T41: Now, did you come in here with something specific in mind that you wanted to do today, or did you...?

P42: No, not at all. I came up to meet with therapist E, and to see where we could go from here, and was pleasantly surprised to see all this wonderful new equipment, and this nice, new layout, and so that kind of side-tracked me.

T43: And, you know, a lot of that is, thanks to you, for putting up the table last time. You know, we didn't talk last time about that process of getting the table with its mismatched holes, and wrong-sized screws. It looks great. Do you remember when you were thinking about that table last time, and you said, "Now, how would one express it when you're at your maximum level of tolerable frustration and you just want to throw the thing out the window?" (Laughter) And I said, "Sounds good; I got it." (Laughter)

P44: That's where it was.

T45: How did that, thinking back on that, how did that work out for you? You said that to me, and then what happened to you?

P46: I guess I got it out of my system. That was the key thing. I don't know what else...

T47: And it was a way of asking for help...

*interpretation
that
leads to
therapist's goal.*

P48: I think it was a way of just letting off steam, really.

T49: Yeah, saying, "This is driving me bananas."

P50: Maybe throwing the problem at someone else, and sometimes that's where it belongs. I think we've talked about it, it really was not my problem, even though I tend to think of it as my problem. It really was not my problem, it was someone else's problem. And that person, having stepped up to it, and made some calls as to how it might be resolved. But that's a key for me, is to be able to say to someone else, "I've done what I can do; here it is, it's your problem." I think we get into that in a client relationship. The client may have some information needs that may not exist, or there may not be any way for me to get it. And that is not my problem, that's the client's problem. The client may, for example, want to know about chartreuse tape recorders, for example. And there just may not be any. That is not my problem. If a client wants a chartreuse tape recorder, that's the client's problem.

T51: That's right. You know, one of the things that strikes me is, you're talking now about this issue about it not being your problem, and I'm thinking back to that session, and I remember you said to me, "How do you remain so calm?" And I said, "First of all, I know that it's not my problem. And then I get help." Right? And, when I said that, at that moment last time, I feared that I was communicating about me, and that it wasn't helpful to you.) So, today, I'm sort of intrigued that it did have some meaning for you.

engagement to
task is critical

change focus to therapeutic goal

impersonal
when giving
feedback to
therapist.

repeat x7
not my problem

transition
from therapist
goal to
future task
goal

presented as
a warning
of

frame
solve

put in terms
of therapy

his being able to
incorporate learning
but he's coming at it
from frustration?

8
this is the
goal of
self-regulation

P52: The message was clear. It's something, I guess I've always known, but very difficult to accept. And I'm sure that it will continue to be difficult. It's something I need to continually work on. But that particular example is so fresh in my mind, so...

T53: Well, I thought you communicated very well about what you needed at that moment.

P54: Thank you.

raises issue about
immediate reflection
vs time to quietly
think things
over

T55: And I was imagining broken glass going out the Clinical Center ther! (Laughter) We've been using activity along the way, and pulling out interpersonal aspects of it that seem to be helpful or things that you've learned out of it, and as I look back over what you've been doing, you have each session come back with an application of what we came up with, or the next question, or, sort of, where are we going from here? And, I'm thinking about that now for today. What do you think is next for you? You've got a month left, right?

change subject
make goal of
applying session
experience in
life

key
goal of
OT

P56: Approximately. I think there are a number of things. A, I have something that I've committed to, which is some research. That's something I need to do on my own, so I'll proceed with that. And now that you have this wonderful system sitting here, I don't have to trek across the street, so that's good. The other thing is, getting some materials together, promotional materials together. And then I certainly need some help, some ideas, and I would say that's probably the next thing that we could work on together, where I could really use some help.

individual
vs
shared goals

asks for
help- this is
a shift -
better able to
collaborate

T57: You know, I was watching another person work on the Pagemaker software program over at the User Resource Center. I'm not sure if we have that here, but it was very intriguing, in terms of changing plot size and putting things in a column, and it actually formatted brochures right before your very eyes.

P58: You don't have it here...

T59: Right.

P60: What it would take to get it on here, I don't know. I think it's a matter of what kind of licenses are available.

T61: And then also, what's the story of trying to learn it, you know, to produce something.

P62: Well, most of the good programs, I think, are fairly user-friendly. The word I like to use is "intuitive." I believe there's so much software out there, that if one were required to read all the manuals, one would never get beyond the second piece of software. Good software, you should be able to step up to the (?) and just somehow figure it out while you're sitting there.

T63: Answer it and go.

P64: It's like, we were using Alta Vista. We really did not have a manual, although somewhere, I'm sure there's a manual. But we were able to kind of get into it, look at it,

The real issue is is not where the software is housed, but how to use it. Same is customer not matter their task, the real issue is being able to relate to them.

and yes, this works, and this doesn't work, let's try something else, and ultimately, you make 10 attempts, and a half an hour later, you've intuitively figured out how to use it efficiently, versus perhaps spending 8 hours reading a thousand page manual, and never really following it, anyway.

task goal

T65: Well, you know, one thing that you're alluding to here is the issue of mastering. You know, being able to know that you are competent in something while you're doing it.

therapeutic goal - self regulation

And, I'm thinking about that now with the customer base. Here's the customer who expects you to be competent. You're trying to be competent, they may not have a topic like chartreuse tape recorders, or whatever that was before. They may not have a task that will enable you to be immediately competent. So, that's something to keep in balance. 001ee, realistic expectations of what it would be to master this new thing, and in what amount of time. I think the other person gave you a little bit of time, right, a couple of weeks...

P66: Yes.

T67: Okay, is there anything else that you want to say about this session?

P68: No, I think it was okay.

T69: Yes. The time is now 5:23, and this is therapist E, ending the treatment session review with patient 001.

5-10

*Rich interview
Zoni*

Session #6

T1: Today's date is May 16th, that's Thursday, and the time is 12:41. I'm therapist E, and with me is patient 001. We're starting the review of the session just held. Today, Patient 001, we're beginning to work on a brochure to start promoting your business of looking on the Internet, an Internet searcher. Could you tell me a little about what we did and how it was for you?

P2: Well, I think we jointly did a little bit of brain-storming, I guess we'd call it. We threw out some ideas, and I think we kind of fed off each other's ideas. And, what we did is, we tried to put down on paper, so to speak, some of the concepts that we felt would be a good idea to try to convey to potential customers, and then we played with them and reorganized them, reordered them, and came up with something that makes a lot of sense, and I have a feeling that this is just the first of many iterations. We'll go back and probably rehash this many times. But, that's essentially what we did.

T3: And we came to be able to do that after quite a bit of fussing in the environment again today. Do you want to talk a little bit about that?

P4: Well, the environmental issues... (laughter)...

T5: They're always here, aren't they?

*shared
accomplishment*

*this is what
we have been
doing - rehash*

P6: Yeah, and I'm a big environmentalist, so.... But, we again had some computer problems and printer problems, and I would say we must have lost 20, 25 minutes, playing around with that. Frustrated.

T7: Searching for help, not being able to quite get the help we needed at the moment. So, we (finally) figured out how to adapt through it, but...

this is the goal of OT

P8: What I find that that does to me is that that interferes with my thought process for some time, even after the immediate problem is resolved. Because I tend to dwell on that a little bit.

T9: Well, it's the old issue about, is this a machine, should we be able to fix it, is it, you know, why is it doing it right now, out of all the times it could choose to do it? Well, but we did end up learning, using a different system, word processing system, over here on the IBM, which is very unsophisticated, but at least it got us going a little bit, so we could start thinking about this...

P10: Exactly.

what does this refer to?

T11: The other thing that happened as we were starting this morning is we came to this right after a community meeting on the third floor. And you had shared with the group some personal changes that were going to be coming up in your life, and I'm wondering how the transition was. Was there something about working on the computer right after that, that made it different today?

Self management of new info about illness

P12: No, not really.

goals related
to self-regulation

T13: What I noticed was wanting to get to a task, you know, trying to talk a little bit about
what happened, but then, on your part, wanting to say, okay, let's get down to business,
let's do something.

P14: That's true.

T15: And is there something about engaging in an activity that helps you process other things
in your life?

P16: I'm not sure about that. I think I'm in a little bit of a revved up mode, and when I am, I
kind of want to forge ahead, and that's totally opposite of how I am when I'm in a
somewhat less positive mode, when I'm in a depressed mode. At those points, I probably
have no interest in doing anything. So, I think that's maybe the difference.

mood-
engagement

2 levels
describe
analyze
analysis
of engagement

T17: Well, you know, the personal topic that you were sharing had parts of it that could be
depressing, you know, quite depressing. And I wonder if there's something about moving
into a task that you know will not be depressing that sort of helps get through some of the
other, you know, the other thoughts that are going on.

P18: I'm shaking my head "no," because I don't believe that that's true for me. I don't think that
there's that relationship.

unsuccessful
attempt at
scaffolding

change to therapeutic goal

T19: When we were working today, the one difference that ~~seemed to come~~ out is that here we were trying to translate the interpersonal things that you and I had been talking about, the verbal things, into something written. You know, something that would communicate your tone of working with people, what services you have to offer, and try to put with words on paper, and try to anticipate some of the communication issues that might come up. Did you see any parallels with the brochure development and some of the other things that we've been talking about?

P20: It's hard for me to say. It really is hard for me to say. I'll probably have an opinion on that later.

T21: Okay (laughter). Something to think about.

P22: (Laughter). Yeah, exactly.

T23: Okay, what we usually do at the end is try to figure out, so what's next?

P24: Well, I think the next step is a little additional hashing over of this. And I'll certainly do some of that independently, and maybe the next time we get together, we can review again what we've done today, and any changes to it, and see how maybe you can help me organize my thoughts a little bit better.

T25: And try to look for a logo and a name, right?

P26: Yeah. A name and a logo. And, I also have the beginning of a customer research project that I will put to bed by tomorrow and then present it to the customer and go through that first iteration with the customer.

T27: Is that by tomorrow?

P28: Well, we'll do that on Monday (audible). So, that's it.

T29: Great. Wonderful. The other thing that I'm looking forward to reading is some of the work that you shared here that you've been writing over the last couple of months, so...you've been sitting down here at the computer doing this, huh?

P30: Uh, that's been done elsewhere.

T31: User Resource Center, or...?

P32: Yes. And down on the floor, actually, a lot of it's....

T33: Really? Down on the floor?

P34: Yes. And because we don't have a printer down on the floor, it complicates things immensely. So, whoever's listening to this, if you have an old printer someplace, there's a

place that therapist E knows of that would certainly benefit from having that old printer, as rickety and old as it may be.

T35: Right, anything. And, isn't that old word processor down there like in Wordperfect 5.1 or something, one of the older versions?

P36: Yes. That's okay.

T37: At least it works.

P38: It works.

T39: Okay, is there anything else that we need to mention about today?

P40: No, I think we accomplished a lot.

T41: We did, despite all of the hazards. Okay, the time is now 12:49, and this is therapist E, ending the treatment session review with patient 001.

Session #7

21 min

T1: Today's date is May 20th, and the time is 12:31. I'm therapist E, and with me is patient 001. We're starting the review of the session we just held. Today, 001, you were working a little on your brochure. You started it last time and you were doing some formatting of it. Could you tell me what you did, and how it went?

P2: Well, I think today we were trying to put it into a more polished form. We were paying attention to the visual aspect of it today, as opposed to the content. We did make a few content changes, but it was primarily the layout that we were looking at today, and so we tried a few different approaches to see what was aesthetically most pleasing. And that's pretty much what we did.

T3: One of the things that you bring to this is your background in marketing, and we've been talking a little bit about how communication is occurring between you and the customer in order to set the tone for what kind of relationship you want to develop. And I was struck by your familiarity with fonts and settings, and sort of your mastery of the paging format. Can you talk a little bit about, when you were changing those, what were you communicating, what were you getting across, by changing those paginations of it?

P4: I think primarily just trying to get a format that would look attractive, and would be easy to read. One of the other things was probably trying to get something that would grab someone's attention.

T5: And it's also that, you know, the logo you picked, tiger (I got the impression) you're in charge, you have a service to offer, you know, there's the role that you're going to be taking in the relationship, and the other person is answering all those other questions. You know, what do I need to do to master my job better? So, you ended up sort of setting the relationship up that you wanted to have with the person.

*meas
goal
emphasize*

P6: Well, my thought (and we didn't talk about this) but my thought is, that it's not necessary to always be original on everything. The tiger has been a very successful marketing logo. It worked extremely well, certainly, for the Exxon Corporation, over a long period of time. The tiger connotes strength, power, and that really is what we want to get across. Again, understanding that when a piece of paper comes across someone's desk, there's only a couple of seconds, literally a couple of seconds, to make that first impression. And, so this is a thought. But, I don't feel locked into it; I think it's worth a try. If it works, fine; if it doesn't work, something else may work.

*client
returns to
task goal*

*more flexible
with levels
gets to therap
goal*

T7: You know, as we were working along today, one thing...two things struck me. First of all, there was a time where we started to close, and I had gone... or another OT had started talking to me, and I went and got the tape recorder, and we started to close, but then we went back to reformatting what... you know, the font, and... Did you have any impressions about what that....?

P8: I did that. And, I think just sitting here, I get a little bit antsy, nervous, compulsive, and I find it difficult sometimes just to sit still.

T9: Um-hmm. And I noticed you kept the other screen there, so when you had a few moments, you could go back and look at some of the money information that you're looking up.

notebook

P10: Yes. Right.

T11: Now, what if that were a customer?

P12: I think I need to train myself to stay on task.

present engagement for future

participation for future

T13: Well, when you were sort of going off to something, it was as if I wasn't, didn't have a need right at the moment, if I were the customer? Is that what it was, or...?

P14: Yes. However, I know that a marketer's job is to stay tuned in and quiet.

T15: And, so, what could you do, if it were a customer, what could you do....?

P16: Concentrate.

T17: Sort of focus on the person.

P18: Yes, absolutely.

T19: So, maybe you could ask them a question.

what we're doing in present is what customers will need

moves from task to interpersonal strategies

P20: No. No, just wait quietly. It's very hard for me to do that, but that's an important thing.

personalize - less formal
 T21: Because I noticed that... because what happened to me, as the person watching) I thought, "Oh, now I'm interrupting you," you know. When I saw another thing happening, I thought, "Oh, dear, then I'm not being in the right pace with you," or something. Now the other thing that happened today was that we were both scheduled to be down in another meetings towards the end of the session, and we got so engrossed with all of this, that we were a tad late for that meeting.

P22: That is a no-no.

T23: Well, we both did it.

who is the reader of or sessions
 P24: No, it doesn't matter. You as the customer could do it, but I shouldn't allow that to happen. And it's no that we shouldn't go beyond, but I should be more conscious of the time. For example, I know that what works best is, if we have a half-an-hour meeting set, at the end of half-an-hour, even though we're going strong, and it appears that you want to continue, it's time for me to say, "I see that we've run up against our half-hour. Should we spend a few more minutes now? Or should we continue later?" But, I should be the one who initiates that, and give you an option.

T25: That's a good point.

P26: In other words, if I've asked you for a half-an-hour of your time, that's all I should take without your consent.

T27: Right, right. Now, we're in a room without a clock.

P28: But I have a clock on my wrist, and that's... so I assume responsibility.

T29: Do you have a timer on that?

P30: I have timers, I have beepers, I have all those things, and I certainly could have set a beeper to go, "beep, beep" at the end of whatever the time period was.

T31: That might be a good idea. Because there was a point, when I got up to close, I felt like it was time to close, but then I got re-engrossed in what you were doing. And then I thought, well, no what if I were the customer? Would I have left and come back and wanted to ask you more, or.... you know, it just sort of flowed; it wasn't conscious.

P32: Well, but, as a customer, you still would have other goals, other tasks that you need to attend to. And it's probably bad business for me to interfere with those other tasks. If you got to the end of the day without doing your payroll because I took too much time, that would not sit well for me. If I interfered with your lunch appointment, that would not sit well for me.

Who's
up inside -
moves from
therap
client to
computers to
interpersonal/responsibilities

Therap
to direct
impression

Combines tasks with
effect on interpersonal
issues

T33: You're right, you're right. And, you know at another point when we were working together, I said something, and you said something about the way I said it was different than other people would, or it was tactful, or I can't remember the exact adjective that you used.

P34: I think I said that you were very diplomatic.

T35: Yes, something like that. Now, how does that....when I would not be like other customers?

P36: I think you're different than the way most people would address situations like that, and that's your background, your training. You're straightforward, but you do it in a different way.

from task to relationship

T37: Right. I don't attack.

P38: You don't say, "I don't like that." You say, "Is there another way that could be done?" And, I think that most people, when asked the question, "Do you like this?" will say, "Yes, no, or maybe." You never say "no or maybe." You always point out what you like about it, and then, "Why did you add this? How would that look if...?" And you do it in a way that's very diplomatic. I don't know what other word to use.

T39: Now, often you've pointed this out to me, and are you interpreting from me, or do you say, oh, I guess she really does want to change it?

direct discussion
of our own relationship

7

P40: Yes.

T41: Okay, so you're still hearing it as direction.

P42: Sure, and that's okay.

exploration of interpersonal
dynamics can be heard as
criticism

T43: Instead of me saying to you, "What are some other options you might have?"

P44: It's okay. All I'm pointing out is that you're nonconfrontational, and I believe that many
other people, innocently, are confrontational, as I perceive them.

T45: Well, my goal, as I'm saying those things, is truly to have you choose the way you want
your document to be. You know, because you're writing a brochure now for yourself.
But to raise some questions about, is this really coming across like you want it to come
across? You know, so when you ask me if I like it or not, my view, whether I like it or
not, doesn't matter. What matters is that you're satisfied and that it's communicating what
....

P46: Well, what matters is that people other than myself are receptive.

T47: True, true.

P48: I'm very receptive to my own ideas. (Laughter) But that's not what the business world is
about.

T49: (Laughter) Well, there were periods where we went back and forth about what font and
what size and how much spacing between paragraphs, until, actually until we both said,
"Yeah, that's it."

problem resolution

P50: Yes, we did that a number of times.

T51: So, we sort of got through the negotiation without confronting. Well, it's good reading of
nonverbal cues. (Laughter). Okay. Anything about the environment? We sort of forgot
that question earlier.

Change subject

P52: No, I think it was fine, I think it was fine.

T53: It's been about the same? Yes. It took a while to get into the thing, figure out what the
right commands were. But that turned out okay, once we got the right things in. Now,
we also had another person in the environment part of the time, working on this other
computer. How was that? Another therapist.

P54: And I had totally forgotten about that. It was okay. I think one of the reasons it was okay
is the person was someone I know, and she was working on her own thing, and there
wasn't any cross-conversation, or anything that would be interruptive.

T55: Okay, now, what's next?

P56: To polish this up a little bit. And see if we can...

T57: See if we can put it on a color printer. Get that tiger to come out with color in it.

P58: Yes, we'll do some of that. As soon as we get this color printer hooked up.

T59: Yes, we'll get our computer person to help us with that. I also will take a look at these papers, and see if there's any backgrounds. Because some of these might be just the ticket.

P60: ...For suggestions...

T61: Yes, I don't know how much cost this is, but...

P62: It's minor, it's a minor cost.

T63: Have you heard anything about your estimated time of departure? We had thought in June, but I...

P64: It seems like I'll be here through July.

T65: Okay. So we can sort of forge on with this, as we feel like it, or stop.

P66: No, I'm going to forge on.

T67: All right. Okay. The time is now 12:52, and this is therapist E, ending the session review with patient 001.

"Salad" - integration
he is responding more directly to me

14 min

T1: Today's date is May 24th, and it's 11:30. I'm therapist E, and with me is patient 001.

We're starting the review of the session just held. Today we were working on putting together some of the documents that you've been developing for your business, and sort of taking a look at what's the next step. And then also, working on some bookmark files.

So, can you tell me a little bit about what you did today and how things went for you?

P2: Yes, there were two things. A, we reviewed some of the promotional materials, we briefly went through those and made a few comments about those, but mostly, we concentrated on the results of the session I had with our test customer, volunteer customer, and some comments he had about how he would use my services in his actual real world. And, let's see, we talked about some of the options that might be available, and how we would use those, and we got into a discussion...you and I got into a discussion of the bookmarks, and how in one service, a bookmark file could be provided to the Internet-interested and -literate person, so that they could follow up on their own.

T3: So, that almost led you to another product that you have to market to somebody, and some different ideas about how to format that and present it.

P4: Yes. You know, more and more, I'm viewing this as kind of like a transcription service, if you will. And we can offer the end result in different formats with different levels of detail and, depending on the users, the customer's needs and the customer's budget, I guess. And that's what I'm seeing.

T5: Now, how was the environment for you today?

it was his problem

P6: The environment was fine. I think I screwed up the environment, for whatever reason; it appears that I introduced a problem into the software, which will have to be corrected later.

T7: You can fix that.

P8: It's not a big deal. Normally, I would have software backup that would have taken me back to that point, so it would have been a few minutes delay. But, the environment was fine.

T9: It also points out that one of the things that we're learning while we're doing this application is more and more about the actual hardware and software we're using. And some of this is brand new stuff, and it's hard to figure out how to maneuver in it, which is one thing you're learning, too.

P10: Yes. One of the other things I should say about the environment, if we think back to a couple of weeks ago, although we're in the same room, the layout of the room has changed, and that, I think, has been very positive. It's just a more friendly layout.

T11: It seems today we had a little bit of difference in the environment, too, with another person coming in to work on the other computer. And that's new for us, I think.

*environment has people therap
from implies interpersonal
goal relations*

P12: Yes. That's okay, that's okay. She was doing her own thing, and there wasn't any cross-conversation, so it was fine.

T13: And, again, it was somebody you knew, right?

P14: Yes.

T15: And, in fact, we ended up having to use her computer for a little while.

P16: Just for a moment, yes.

T17: So, that was sort of nice that there are two computers in there. Well, you know, I was thinking back over the time today, and reflecting on a couple of things. One of the things that struck me is, when we first got together, both of us had things to say to each other that related not to the activity so much, although partly to the activity, but almost more to what other conversation we've been having. In other words, we've been talking about these sessions afterwards. And, you know, we were first of all talking about how to handle a personal situation in terms of communication, and what some options might be to share with somebody that you care about, you know, some news that you have that is difficult to process for people. And, we were sort of brain-storming about that a little while, and then also you had some comments for me about what this process has been for you in terms of [not just the task, but other things that had happened] And, can you talk a

discuss task, engagement to get to therapeutic goal

client has personal health issues - how to relate about it.

levels

8-3

client is missing task engagement + therapeutic goals

little bit more about that? Because I was fascinated that we both came in this morning with, you know...

P18: I was thinking about the fact that the initial task is not what it really was about. And, probably very often, even in a business situation, even in my business situation, the initial task may not be what it's about. It may just be the way to get the door open. And from that, I guess, all kinds of things can happen. And, I'll share with you.... I have a friend who is now manager of a food company, but it started out because he was semi-retired, if you will, and just was helping someone out by doing a little clerical work, and that was the initial task. So, that initial task turned into something that's quite a bit different. And, this is maybe the way some of these relationships go, we go from the peanut butter and jelly sandwich into, perhaps, a business concept, and...

T19: You know, as you bring up the sandwich concept, that's a component of OT evaluation.

And, I'm very curious about this, because we were chatting a little bit earlier about the evaluation process, and you and I did that initially together. And your thoughts about what it was like then versus your understanding of it now.

P20: Well, let me correct you; we've never made a peanut butter and jelly sandwich, okay?

T21: Okay, whatever we did (Laughter). We did folding laundry...

P22: We did laundry, we folded laundry, but the important task was, we used my strengths and I prepared a salad. I remember the salad. Without tomatoes.

reflection on
own present
relationships
not task.

adaptation is
clarifying reality

levels of
reality -
same event
different view

hope -
differs
from
initial
pessimism

scaffolding
meaning of
engagement

scaffolded
reflect on
past shared
engagement

past = time before OT
" previous time spent in OT (shared past)

T23: Uh-huh. That's right, yes. (Laughter)

P24: And that's where we started. But, in my situation maybe is different than others in that I typically eat lots of salad, and therefore, prepare lots of salad. At home, one of my jobs has been to prepare salads. So, it wasn't a strange thing for me; it was just business as usual. But, nevertheless, the salad led us into a lot of other things. As I recall, during a salad conversation, we got into some advocacy issues, which led to some other things, and on and on. So, things have a way of pyramiding.

T25: Yes. And I remember one of the things you were mentioning was that sometimes, it's just not the task itself, it's all the other dynamics that are happening while I'm with you.

P26: Well, that's exactly what I was saying.

T27: That I may be looking at some different things than...

P28: We certainly never, or probably would not have had an opportunity to get into a ... what I think was an emotionally charged advocacy issue, had I not been doing this very mundane task, and probably, at the time, not feeling that this task had any relevance to why I was here. Making a salad and being here had no relationship in my mind. But, that led us into something else, and that would never have happened in another situation.

engagement
led to new
goals,

client
sees
levels -

my role
as therapist
put a different line
on things

goals derived
from relationship
during engagement

client
sees
differences -
> sees patterns
> speculates outcome
8-5

T29: Yes. And the problem with that task idea, and it being an evaluation, is that it's not an opportunity to talk about it, like we have since. You know, when we've done things together, we sort of chat about it. And, it makes it a difficult situation, because I can't sit there and explain what it's about, or it would be an invalid test.

roles in different contexts = another level

P30: That salad was prepared about nine months ago, and I don't think it really was until very recently that the meaning of the salad came to me. And that's as it should be. I think the analogy I used was, in trying to tell the joke, and I said to you, "Suppose there was this joke about the lawyer, the doctor, and the priest, and I told you that fact, and then I told you, and the reason why it's so funny is because the priest is closer to God." And now, after telling you that, I tried to tell you the joke. The joke would no longer have the humor.

- time to integrate

T31: Or be valid.

P32: The joke might still be valid, but it wouldn't be funny. You wouldn't laugh as hysterically as you might otherwise.

T33: 001, let me explore a little bit about something here. You were saying that it took like a nine month time period, it took a time period, between starting with one activity and now. And, besides time, what do you think some of the other things are that went into you being able to see the meaning?

reflecting on doing → meaning

P34: I really don't know.

meaning =
1) understanding
2) significance

T35: One thing you mentioned already was a relationship forming.

X P36: Well, that makes it easy to talk about it, but I'm not sure that that put it in perspective for me. I think it just made it easier to discuss it. Obviously, over the nine months, we've had a chance to get to know each other a little and to talk about many different things, so there's a comfort level. And that's no different than a customer situation. When one has an opportunity to discuss things with a customer over a period of time, a relationship can be formed, and to be very profit-oriented about that, that's a good thing. So, I'm thinking that sometimes maybe it's a better idea to be able to come back a number of times, as opposed to one meeting, because one meeting doesn't allow enough small talk to get to know someone.

T37: Now, I offer a thought here, because I've been [seeing some parallels] between our relationship and your business. It seems like the more we have developed, you know, the more knowing about each other and more camaraderie, and sort of on the same wavelength, our ability to do the task has been improved. We sort of know what that other person might be bringing to it, or what kinds of questions it might mean. And, it seems like the same thing would happen with a customer. That the relationship becomes the thing that

P38: That's very true, very true. A good thought to keep in mind, again.

levels

T39: It's interesting to me that that has really been what we've been working on. (It's like we've been talking about interpersonal things from the very beginning, and that's something you brought forth, about ways that you see yourself coming across, and changes that you might want to experiment with.) And to me, I'm seeing a lot of progress.

P40: Thank you.

T41: Okay. Anything else about this session?

P42: No.

T43: The time is now 10:44, and this is therapist E, ending the session review with patient 001.

*Therapist helping him
extend his therapeutic
goal - he's really
not there yet.*

Session #9

15 min

T1: Today is June 6th, and the time is 12:15. I'm therapist E, and with me is patient 001.
We're starting the review of the session we just held. Today you were working on pulling together some addresses of senators from the Internet, and compiling a referral list for yourself. How did that go for you?

P2: It went fairly well.

T3: What did you end up doing during the session?

P4: Well, it was basically what I would call hack work. Just pulling up lists on the Internet, finding the phone numbers, is what I was really after, for the key senators. So, it was a matter of finding the listings on the Internet, which were fairly simple, and then copying them into a document, and creating a document for myself that I could use for my own personal interests. But, I can see that this kind of thing could be done on a commercial basis as well. It could be done for any one of a number of reasons. Again, the thing that I was doing was pulling something from one screen document, and pasting it into another screen document.

T5: What I noticed is we tried out that technique, maybe even a month ago or so, and tried to figure out how to do it, and today you just whipped right in and did it. Not only that, but the idea of doing it came quickly to you. You started to print out each page, and then

scaffolding of task
motivation

independence

shared past

change in performance

task goal

competence
9-1

outcome -
1 month

said, wait a minute, why don't I do a file so I can print the whole thing, so.... that ended up giving you choices about how to do a task.

P6: (I think what it does for me is, it confirms the logic of a business approach to doing this kind of service for other people who do not have the time to learn these skills, and, therefore, may be willing to engage someone else to perform those services for them.

change topic
T7: Now, in terms of the environment today, we started out in a shared space in our computer room with another person in it. And then... can you talk a little bit about what happened during the session?

P8: It was a fine environment. The other person who was there is someone who is known to me, and I knew that anything that I was doing and conversation that we were having would not interfere with her work, and, similarly, she was just doing her work without any conversation. So, I didn't have any distraction, and I was not distracted by the thought that I would be distracting her. So, that was fine. And I had no guilt. So, it was okay.

levels of interference and relations

T9: (And we started out) I guess I was in there and she was in there, and then you came in. And then maybe about halfway through, another therapist came in, to work with her. So we had four of us in the room for awhile.

P10: Right. But, again, all of the (?) are known to me, and it's a cordial relationship. So, it's okay. I guess that says something; if the right people are there, it's okay to have some of this distraction.

T11: Now, in terms of the right people, one of the things that makes these people "right" is that you have formed a kind of relationship with them, that you feel safe in, right?

P12: Yes, yes. It's a non-threatening environment. None of these people are there to critique me, to make demands upon me, and that's very important. So, while we had some chit-chat, some really idle chit-chat about nothing going on, it wasn't intrusive in terms of what I was trying to accomplish. And, I guess that's really an important part of it. It wasn't people saying, "Well, why don't you do it this way," or "why don't you try it that way," or "How about this, or how about that." It was a very... I was focused, one part of my brain, I guess, was focused on what I was trying to do. Another part of my brain was focused on the idle chatter that was going on. But the two didn't interfere. That's very important.

T13: What I found very interesting today is, this is the first time.... you've been back now, this is Thursday, and you've been back since Monday, right? And we've seen each other, but we haven't really had a chance to stop and really talk to each other. (And I was struck again by both of us, in the beginning of the session, having things to say to each other.) And, you were sort of sharing about an interaction that we had had, what, Monday or Tuesday or something, over the...

gets into discussing
Swap goal when I ask
about environ. shift from
single a two
she comes to analysis more quickly
it's always more complex
2+?
This is a pivotal shift away from seeing just the task
levels
work in goals goes on in sessions
client brought up a shared past levels creating understanding
9-3

P14: Um-hmm. Tuesday morning.

T15: Tuesday, okay. About the Netscape. And, would you feel comfy saying a little bit about that on the tape, or...?

P16: Sure, sure. Tuesday, there was a problem. And, I was quite frustrated by it. And, I think I was upset. And, I was upset with other people, frankly, for not paying attention to what they should have been doing, technically. And, something you said to me Tuesday morning when we talked about this problem got me thinking, and while you didn't say anything to me directly, I thought about it, and it was later Tuesday evening when it finally to me that the problem was one that I had somehow caused to come about, more than a week prior. And yet I had not recalled it, which is my issue, it's not your issue, it's my issue that I didn't recall it. But, at least, 12 hours later, I came to the understanding that it was an old problem, a, and b, I was the one who had caused it, and therefore I shouldn't have been so angry at other people, I should have been angry more at myself, I guess, for having caused it. And I was thinking about the really tactful and wonderful way in which you led me into that area of thought, which you do all the time. And I don't know that that's the subject of this tape, but I think it's a wonderful technique, and I was thinking about that technique, and bringing that technique into a business arena. The technique of never accusing people, of not using the "y" word, I think is how I referred to it, the "you" word. Something that therapist E almost never says to me is the "y" word, the "you" word. Therapist E will say things like, "Notice how this works," but not "Did you see this...", but "notice how this works." Or, "Look at how that is," but without pointing at me, and I think it's a good technique, and I could see that, in any situation, and

This is the habit of reflect on!

This is an outcome of therapeutic goal -

talks disc. my about relationship

describes self-regulation

outcome

reflect on our relationship leads to future satisfaction self-regulation

particularly in the kind of situation I'm going to be in, trying to deal with clients, it could be very effective not to say, "You didn't tell me to look up this," but rather say, "Oh, should we look at this?" As opposed to using the "y" word.

links his communication with tasks success

T17: You know, you were asking me about that...

P18: (Laughter) And it sounds kind of funny, and whoever's listening to this tape may not get the point, but I'm dead serious about it.

T19: I think you made it very clear. I think, you know, when we were talking about it earlier, the thing that I said in response is that, when I'm thinking about how to interact with somebody, I try to frame it a certain way. I try to figure out, is it a problem that I need to solve? Does it have high emotion in it, is it anxiety-producing? Is it just a task, where I have to figure out what the steps are? Is it something about the relationship, the person, that I need to attend to? And, once I figure out the frame, then I can figure out how to respond. And, just as you were describing it again, I guess the frame that I bring to working with people is that relationship is the most important. And, when you came in on Tuesday, remember you said, you came in and you said, "It's the relationship. It's really the relationship that seems to have been the message in all of this." And, that's what you actually have been working on since you started with this computer, was that, how do you deal with the people, and the political situations and the social relationships that you're going to be in?

his one task for growth - start mundane - go deeper needs task to be auto-matic, so he can deal with other things

states importance of communication

I clarify this into collaboration

shared past-memory

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P20: It's interesting; I'll say something else that may or may not be relevant, but I'll repeat for the record, something we discussed. And that is that it's not about the peanut butter and jelly sandwiches. The peanut butter and jelly sandwich—in may case, it wasn't that, it was something else—but, whatever...

T21: Salad. (Laughter)

P22: Salad, yes. But, it was the salad that led us into a whole avenue of very rewarding thoughts, ideas, concepts, and it would not have started, were it not for the salad. I really don't believe that it would have been possible to just say, "Let's look at the computer." It was the cutting of the lettuce, or the whatever else was in that; I don't even remember what was in it.

T23: Well, we've had sort of interesting levels of things, because we started out doing a salad, and you were doing it and I was watching. And, so that was sort of uneven. And then we ended up doing other things together, like some of the advocacy things, where we were more even. And, sometimes, with the computer, you were the one teaching me. So, we've had different levels and ways of relating to each other during these different activities. (What strikes me) is that that's going to be the same with the customers that you work with. Some of them are going to know more than you do, some of them are going to know less, and some of them, you're going to be equal with. So, it's figuring out quickly what the other person brings to the relationship that is the challenge.

P24: Maybe the message is to start with the salad. And to be sure to start with the salad, and not to get directly into the business, but just take whatever little bit of time, and I know that's true, but sometimes I lose sight of that.

T25: Yeah, a couple of minutes. It can be as little as a couple of minutes.

P26: That's right, to take those few minutes, and make the salad.

T27: Well, you know, Patient 001, what I find probably the most fascinating part of our working together is the parallel between the activity, what you are doing on the computer, and what personal relationship things we're also working on. Because, today you went back to something a little more familiar, okay? You got on target, you already knew how to do that two-page thing. But, by the time we ended up working together, you're starting now to talk about what's next, do we go to the vocational counselor, sort of, how do I progress on with this? So, today, you ended up going to something that was safe, and you'd mastered, and that came after this whole problem with the Netscape. And I thought, that is a very positive thing for you to do, because that's just what you do in relationships. When something is sticky in a relationship, you go back to someplace that's safe, that you trust each other. And then you forge on ahead into something that's more complex, like we started to get into (?) freeloader(?). And we sort of parallel today with the activity, what happens in a relationship.

Link
engagement
with
goals

working
on computer
is like work
with people

applies
to life
goals

goes into "how's"
self regulation

P28: Exactly. I think that's very true.

T29: It's pretty amazing. And, it's this going back and forth between the person and the task, that I think you have really learned here. My impression from your descriptions of prior things is that you were focusing on the task, you know, get that task done. And then the people around would be trying to guide your ability to do the task, and you were getting frustrated because you just wanted to get the task done.

outcome =
how to
work &
single

P30: Right, I think that's, in large measure, very true.

T31: So, this has sort of modeled some different ways that you can do a task.

P32: It will be interesting to see if I can continue this in the real world. This is somewhat of an artificial environment.

goal of
train self-
regulation -

T33: But the trick is to try now with some different people. I think what we'll need to do is think about how to approach this with Martha, and what exactly the goal is, and what you want to demonstrate. There might be several ways to do it. One, to tell her about it. Two, to ask her to give you a topic and work with her, and show her what you can do. And, then, get her feedback on it, figure out what to do. Now, the other thing, you're going to be here this week, and then you're out next week. Do you have, are you coming to a closing time here? Do you have a discharge time, or...?

P34: Tentatively towards the end of July.

T35: Okay, so a couple more months.

P36: But I'm going to be gone for most of that time. But, I should share with you my schedule, and we'll work something out.

T37: But what we're also beginning now is some closure. You know, how do we pick up what we've learned here, and plan for the future, and be able to help you take this from here.
Right?

P38: Exactly.

T39: So, we probably need to start chatting about that a little bit.

P40: Okay. Well, we'll do that.

T41: Anything else that I have neglected to mention, or that's popping in your head?

P42: I think we've covered it.

T43: Okay. The time is now 12:30, and this is therapist E, ending the session review with patient 001. And this is June 6th.

Session #10 Exit

14 min

T1: Today's date is July 23rd, and the time is 2:26. I'm therapist E, and with me is patient 001. We're going to review the use of the computer during the whole stay, rather than one session today. I was thinking how often we have sat and talked into the tape, but it's usually been about one session at a time, and what happened in the hour immediately preceding what happened on the computer. And I was thinking that we've done so much with the computer itself and other things here during your year... right? That you've been here at NIH, and I was thinking maybe we could do a little reflection on not only the computer, but were there things about the computer that transferred into other areas of your life, or things that you have maybe given some thought to?

effect of scaffolding

asking for long-term outcomes

P2: Definitely. I think a lot of things have transferred. I suppose that the computer was kind of a jumping off place. It was a place for me to isolate when I needed to isolate. And, I certainly did that many times. It was just a place to run and hide, and yet I could be doing something. And then I think it was a tool that was available to help me look at some of the things in my life that I need to attend to, and to look at some of the things in the future. So, it served a lot of purposes. And when I say the computer, I'm talking not just about the computer itself, but about the environment also... the room, the facilities, the assistance, the software, the hardware, the whole thing, the whole experience.

metaphor levels

new self-negotiation is the goal - beyond task specificity

T3: Well, I was sitting there reflecting—I guess it was last Thursday when we were all on community meeting, and thinking about all you have done to help make that room what it

10-1

is. And, if fact, another patient from the unit had come up that afternoon and said, "Now, what did Patient 001 do?"...What did 001 do? (Laughter)

P4: Stenographer, strike the ...

T5: The "Patient 001" (laughter)...

P6: It's okay.

T7: And, when I said that you had made the tables and thought about how to put the icons on the side so people could get to things easily and sort of set up things for us, she was really amazed and pleased. So, I think that's just sort of a whole other aspect of what you did in tasks up here that I'm not even sure reflected on the tapes.

P8: I view them as very simple things and not even as tasks. I just do them as part of being....

doing & being

T9: That whole thing about being part of a community, you know, I think really was something you did up here. Because it wasn't only with me that you would have interactions around the computer; there were several other OT staff that you worked with, too. And then also other people who came up to use the computer, other patients.

*extend
banning to
future
communities*

P10: On occasion, yes.

T11: So, it became almost a work community up here for you.

P12: Very true, very true.

T13: (One of the things) you and I were doing a lot of talking about were sort of the relationship that you were going to set up with the customer, or sort of what was going on in our relationship as we went along. Did any of that part of what you were doing carry over into your life?

P14: Well, I think in a sense. (It's hard to express, but I think relationships are developed over a period of time; they don't happen one-two-three. And, I suppose that many times, I've looked at things as they should happen right now, they should be one-two-three, and that includes relationships. And I guess, looking back at it, relationships that have worked here have taken place over a period of time. My meeting with you.... certainly, I think we've developed a good working relationship. It didn't happen the first time that we met, or the second time, or the third time. It just took time for us to kind of get to know each other. And I suppose the lesson there is that that's what's going to work best.

outcome
self
regulation

T15: The reality of it.

generalization
P16: In the real world, in the business world.

T17: And, it's almost ... there were two kinds of relationships, because when I was playing the customer for a while, you know, we were trying to imagine what if there were a customer who may not have a long-term time to develop a relationship, so there was sort of that

levels of
therap
goal

level of things you were looking at. Like, what if you get someone with a personality of a certain style, or certain interaction pattern, it may not end up being a long-term relationship. There's still those kinds of acquaintances to deal with, too, in life.

P18: No different than it is here. There are a lot of people I've met here who have not... we've not developed a close working relationship, but that's okay. There are professionals on the staff who it's remained a professional/patient relationship, and it's okay. It doesn't have to be a close working relationship with everyone.

T19: In fact, it would be too tiring if all of them... (laughter)...to trust that many people is a lot of work.

P20: I don't think it's even trust; I think it's a matter of just developing your relationship, working on it. It's like a project. There's a limit to how many projects most of us can carry at one time, and a relationship is a project of sorts. It is because (*break in taper*) to work, you have to be attentive to it.

T21: I'm sitting, as you're talking, and I draw some parallels even with the computer. Like, picking out initially some things that you were doing, you were sort of word processing, and then getting into the Internet, and that sort of thing about trying out something, printing it out, seeing how it works, and there was that negotiation that goes on with the machine that also happens with people along the way.

P22: I think so.

back to metaphor

*our relationship
was regulated
over time*

T23: Well, as I have reflected on the many things that you have done over this past year, I think, for me, the computer is also a pivotal point. It's almost when we really started working closely together. Some of the advocacy things we started, but then we couldn't really nurture because of the regulations here at NIH. And I remember particularly the candlelight evening. You know, there was a lot of camaraderie, I think, that started there. Knowing that there were similar value systems that we held, and similar sort of life experiences, maybe, probably just overlapping some of your college years and my high school years.

P24: And even where they're not similar, they're complementary. And that's another part of, I think, developing relationships, is to value not just the similarities, but to value the dissimilarities, as well as the complementary factors. They're all important. They all play a role.

T25: But I remember after that period where we weren't doing Monday morning meetings anymore, and we weren't constantly talking about advocacy and what's in the paper and who could be written, and... I remember some of the early times we had together were letters to Congresspeople. And then it was sort of interesting that our work together turned into something that was towards your own personal goals, in terms of work future, which was interesting. One is the outer environment, and one was sort of the inner environment.

P26: Complementing....

10-5

T27: Yes.

P28: However, you should know that although we don't discuss some of the other issues, the other issues are still there and still alive.

T29: That's right.

P30: The letter-writing campaign and so on. Those things go on. It's just they go on in a different way. ...I wanted to say something I really think should go on record because I was thinking about it just a few moments ago. You keep talking about the computer, and one of the reasons that I kept coming back, I think, was because the computer access was here, but I was thinking about how I've read that many time for children, a computer has been useful as a way of getting kids out of their shells. Kids who were very withdrawn. And I was thinking, it kind of worked that way for this kid, for this grown-up kid. And, I think it's wonderful. I think you're to be commended for expanding the facilities here and not just the hardware, but the access and getting some extra software, and I know you've got some other plans in the works. And many people—and I hope someone is going to listen to this and hear this message—many people may view it as an expense. It seems that, as I view it, it turns out to have been not an expense, it was an investment. And I'm happy that somebody was there to make that investment for me. Because I think it helped me a lot. I would hope that it could help other people.

T31: Well, as I think about that, we're beginning to take shape....I truly mean that it would not have become what it is now if you hadn't been there with your expertise and your vision. So, again, nice complement. You know? I also wanted to put on the tape the follow-up that you had. I think one of the interesting things that I'm not sure we really have talked about on here is going down to the Office of Economic Development and Small Business Association. Because that's really coming full circle, having come in here and giving this year to NIH, to be going out and making a connection in the community with something you developed here.

outcome - participation

P32: Well, I hope it's something that works. But, at least, I'm trying.

T33: Can you say a little bit about going down there, and... I know you met with somebody else (inaudible). Could you say a bit about that?

P34: Yes, I think the purpose was to see if there was some help I could get in terms of putting my ideas for a service-oriented business in place, some help in terms of maybe developing a market, what have you. And I can't tell you what's been done to date, because we're just really at the beginning of it, but based on these small, short meetings that we've had, certainly it seems like there may be some help there for me, and I would guess, for others. It seems like the county, Montgomery County, has some facilities in place, they've got some staff in place who may be able to help. So, I can say, hey, if anyone is listening, and if you've got some ideas, throw them out at the office and see what they can do.

T35: Yes. They had come here about a year ago, I guess, and talked with a group about some of the services that they had, but I don't think you were here at that time.

P36: No, I wasn't.

T37: So, here was, for them also, sort of a return on their investment. To come in here and describe what their services were. So you're the first one to have gone through the whole process.

P38: Well, the real return on their investment will only come if I succeed at what I'm doing and we start paying taxes in the county.

T39: (Laughter) You're probably right.

P40: That would be the return. We'll see. It'll be interesting.

*therapist's
self-regulation*

T41: Well, I would also like to say how much I have learned from you. I think a lot about you sitting here saying what you learned, but I have learned a lot about somebody coping with what you have to cope with. Sort of making it, in your experience, what's real for you, come across to me. And that's very helpful. Because it's hard to help somebody when you don't quite understand what it is that they're going through. And you did such a great job of, if I would try to say what I thought was going on, you would say, "No, wait a second; it's not quite that, it's this." And, that took a lot of vulnerability on your part, and I appreciate that.

1 year outcome

P42: Well, thank you. Again, as you well know, it's not something that happened instantly.
It's going on a year. It didn't happen in the first few weeks, it didn't happen in the first
month or two, it took time. Again, it's developing relationships and that refers to
everyone. It refers to the nurses, the doctors, the technicians. It takes time until one can
open up and feel comfortable, and ... there we are. So, thank you.

T43: Well, I hope all of this contributes to not only research about the illness and medication
that you've been trying, but also on our end here, I hope that we can figure out, what
about the computer, and what about relationships, and what about the environment seems
to help people the best. So, hopefully, it will carry on to the next group of people that
come in. Anything else we can think to say?

P44: Thank you.

T45: You, too. Okay, the time is now 2:40, and this is therapist E, ending the review of the
overall treatment with 001. So, we aren't really talking about a particular treatment
session. And we just started this tape on the 23rd, and we're finishing on the 23rd.

10-9