The patterns in this collection are an addition to those that appeared in *Fearless Change: Patterns for Introducing New Ideas*. Our passion for this topic didn’t end when the book was published. Rather, we continue to read, observe, take extensive notes and, most importantly, listen to comments and suggestions from our readers. We have not stopped learning about leading change!

As people exchange ideas about the environment, and exchange patterns, the overall inventory of patterns in the pattern pool keeps changing. …Of course, this evolution will never end. (Alexander, C.A., The Timeless Way of Building)

A pattern language and the patterns in it are living things. The work is never finished. We are grateful for the opportunity to share as we are learning. This paper contains the following new patterns: Concrete Action Plan; Small Concession; Myth Buster; Go To Person; Imagine That!

References to existing patterns in our *Fearless Change* book or in this paper appear in a different font, e.g. Do Food. Abstracts for the *Fearless Change* book patterns can be found at: www.fearlesschangepatterns.com

The patterns are written in a variation of Alexander’s format. Each pattern includes:

- Name in bold
- Alias (if applicable)
- Abstract in bold
- Opening Story in italics that conveys the essence of the pattern
- Context
- Problem statement in bold
- Description of the Problem and Forces “Therefore” in italics
- Essence of the Solution in bold
- Elaboration of the Solution
- Resulting Context
- Known Uses in italics

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Concrete Action Plan

To make real progress toward your goal, at each implementation step, say what you will do, where and when you will do it.

Larry Smith has mastered the difficult art of translating ideas into action. Typically, says Smith, the problem is that we don’t know what result we want in the first place -- let alone how we are going to achieve it. The solution: Start by defining a concrete desired result, and then work backward. Map out the entire execution process, from conception to delivery, and then put someone in charge of each step.²

You are an Evangelist who sees a need for change. You have a clear vision and are proceeding toward it Step by Step. You always take Time for Reflection, but you often find that you are overwhelmed by the large goal you have set for yourself and defining what each small step should involve.

How can you stop spinning your wheels and make your move from goal to action?

It’s easy to confuse a clear vision with a short distance. Yes, the destination is clear but the pathway requires many small steps. (Jim Stoffel, CTO Eastman Kodak Co.)

You’ve probably experienced the frustration of setting goals only to see them fade away. The goals are so far out that you can’t seem to reach them. In some cases, you never think seriously about them after documenting them. Goal setting makes you feel good for a while but then you feel let down when nothing happens. That leads you to ask whether goal setting is even an exercise worth your time and effort.

You want to get somewhere but you just end up spinning your wheels.

Therefore:

Describe each small step as a set of concrete actions. Include what you will do, where you will do it, and when you will do it.

For example, if you want to lose weight, avoid general statements such as, “I’m going to exercise more and eat less.” Be specific-- say exactly what exercise you will do, where you will do it, and when you will exercise. “I’m going to walk around the block after dinner on Tuesday and Thursday.” Schedule the exercise as you would anything else on your calendar for a specific time and place.

Don’t simply make promises. Focus on actions. Create an “implementation intention”—write down a statement that clearly defines what, where, and when specific behaviors will be performed. Keep it simple and make sure it is achievable in the time period you are committing to. This makes it more likely that you’ll keep your promises with yourself to reach your goal.³

When feelings of powerlessness overwhelm you, move your efforts toward the next small step you can completely control for now.

Take Time for Reflection periodically to evaluate if you need to revise your steps or your ultimate goal. Celebrate your Small Successes along the way. This will help to keep you focused on your accomplishments rather than the long road ahead.

This pattern builds new habits—it replaces old ones with new ones. It helps you take the next step and then follow through. Since most of what we do every day is done on “automatic pilot,” this sets new triggers that will bring about desired behaviors instead of doing the same ol’, same ol’. By expanding your resolutions to


reach large goals with a simple and well defined plan of action, you are more likely to avoid procrastinations, overcome distractions, and carry out your resolutions.

However, it’s easy to “fall off the wagon.” It’s not enough to set up new triggers and hope for the best. You will also have to include in your implementation intention an allowance to help you deal with possible wayward slips. The tendency is to give up everything after even the smallest transgression. Be patient with your efforts and willing to forgive mis-steps. Look for a Shoulder to Cry On when you slip up. We are all human. No one is perfect. Reflect on whether there is anything you can do differently as an experiment and then move forward.

Thomas asked Werner for some advice for solving a problem in his consulting business. Werner said, “Go with your instinct. Never compromise your values and, above all, follow your heart.” “Thanks for the great advice,” Thomas lied. He had no idea how to apply all that well-meaning advice. Another friend, who was sitting at the table said, “I would start by trying one of those new approaches you mentioned when you have a client who seems to be open to a little experiment. Then you can see how that works and decide whether to continue or toss it out.” “Thanks!” Thomas replied. And this time he meant it. He was remembering a section in Made to Stick (Chip Heath and Dan Heath, Random House, 2007), that said concrete information is more effective—it’s true!

David Armstrong, the fourth generation of his family to run Armstrong International, tells the story of how he got people in his staff meetings to stop being negative about new ideas. He wanted to introduce a new heat-sensitive paint that changes color with temperature. He knew that the initial reaction of his senior engineers and salespeople would be: “It’s too gimmicky. We sell engineered products.” “Our current paint is good enough.” “Why would we ever want to fool around with something like that?” To make sure he didn’t hear those things, he told people at the meeting that they were there to discuss new ideas and then gave everyone an M&M, saying, “You are allowed one negative comment during this meeting. Once you make that comment, you must eat your M&M. If you don’t have an M&M in front of you, you can’t say anything negative.” It worked well. Instead of simply saying what the goal of the meeting was, David had put a simple implementation intention on the table. The staff caught on quickly and jumped on any negative comments with, “Shut up and eat your M&M!” They got a new product idea out of the meeting—steam traps that change color when they stop working.

Karen’s nutrition counselor told her, “It’s not good enough to just promise yourself, ‘No more junk food,’ instead, say something like, ‘I’m not going to walk into the kitchen as soon as I get home and start to snack so that I’ve eaten 1,000 calories before supper. I’m going to change into exercise clothes and walk around the block. I’m also going to have fresh fruit and veggies ready to eat as I am cooking dinner.’”

The National Novel Writing Month web site (http://www.nanowrimo.org/) supports writers as they create a novel in a month. The success rate is high… Why?.. because the site offers support in the form of a concrete action plan each day.

Stephen was struggling to learn about his new role as the team manager. He made a lot of mistakes. He especially had difficulty apologizing for his mis-steps. He would say to himself, “I’m going to do better next time.” But it didn’t seem to help. Finally, his mentor, Jake, sat down with him and said, “To say you are sorry takes real courage. Even the worst behavior can be forgiven if you are willing to do three things:

(1) Apologize, with sincerity and without self-justification.
(2) Talk about what you’ve learned from the experience.
(3) Say what you will do differently in the future.

But remember, your credibility will only carry you so far if you establish a pattern of apology following by another explosion. Your team is
likely to see you as manipulative and not to be trusted. "It was magic. Now instead of a big promise to himself about an ill-defined goal, he had a few simple steps he could take to address his problem.

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Small Concession

To address the concerns of someone who is resistant to your cause and making a lot of noise, consider a small concession that will show you acknowledge the point of view and contribution.

Dick and Jane are semi-serious bike riders and take long rides through a rural area where lots of local farmers keep big, fast dogs. It makes for some exciting sprints when dogs charge them as they rode by. After awhile they learned where the more aggressive dogs were and got in the habit of carrying dog biscuits to toss at any dogs that got too close. It was a sure-fire scheme that had an interesting side effect. Over time the dogs expected a treat and became more playful than aggressive. Dick and Jane began to be less fearful and started calling them friendly names instead of cursing at them. Dogs are like the rest of us, fearful of having our territory invaded. We make a lot of noise about protecting the home front when most of us just want someone to pay attention to us and acknowledge that we exist.

You are an Evangelist with a new idea. You see a need for change so you are working hard to spread the word about your ideas, but not everyone is getting on board. Some are with you, but there are skeptics who have resisted your attempts at Fear Less, where you have honestly tried to see their side of things and learn from them. You’ve done a good job at deciding when to Pick Your Battles, so you know what things are important to you and what things are not so important or unimportant.

Someone is particularly resistant to your suggestions and is standing firm on one or two points. It’s hard to see a way around this person.

Change is difficult. It often puts people in a position of possibly losing prestige or status, so we often find ourselves face-to-face with someone who won’t budge on some minor issue. They may be testing you, as much as your idea, to see what kind of person you are and what values are important to you.

It may not be that difficult to allow them to hang on to their pride instead of stripping them naked and taking them prisoner. It’s a better strategy to acknowledge that you might not have all the answers. If it’s “all about you” and “your way or the highway,” others will be less supportive than if you evidence real leadership and a concern for how others feel.

You are at risk for making a real enemy by not being open to a small compromise that might be very important to someone else. Sometimes allowing people to have something to hang on to helps them become more comfortable with the new way of doing things.

Therefore:

Make a small compromise to specifically address the sticking points, the things you and the skeptic are not agreeing on.

Go in with the attitude that rarely does anyone have all the answers for anything. Look for common ground and places to compromise along the way.

Consider a Trial Run for any ideas both of you see as possibilities. Set clear expectations—establish the length of the trial and the evaluation criteria for the concession. Be open to learning what you can from every experiment and be flexible about adjusting your ideas. In other words, be an Evangelist, not a fanatic. An all-or-nothing approach will only turn off others.

Take this opportunity to appreciate the view of the resistor. Send a clear message that everyone is on an adventure together. There are few, if any, “rights” or “wrongs” – instead, progress is a
series of small steps where everyone is always learning.

This pattern encourages respect for individual differences in adoption of your new idea. Since you have compromised for the resistor, it’s likely that he will become more open, not only to your idea, but to a more respectful relationship with you. Sometimes allowing resistors a small “win” will bring them to your side. Sometimes a resistor can become an ally. Since you are proceeding in a Step by Step fashion and learning about the change initiative and the organization as you go, this will provide a learning opportunity for everyone concerned.

However, it’s also a real possibility that, even after your compromise on the sticking points, some skeptics will retain their position. It might be worthwhile to consider this person as an effective Champion Skeptic, someone who takes on the role of the skeptic for a time and has the responsibility to point out all the downsides.

Paul was a department manager in Kathy’s organization when she was introducing patterns. Paul wasn’t resistant exactly, just not supportive. A proposal Kathy had made for a prestigious publication was accepted—an experience report about their use of patterns. Kathy stopped by Paul’s office and said that she would like to mention his department’s efforts in the patterns adoption and if he wanted to let her interview him she would be happy to include his name in the list of authors. She made this offer without realizing how influential the strategy was. Paul suddenly became very interested and very supportive and very involved with patterns and very concerned about their success across the organization. The whole experience taught Kathy how a small concession can have a large impact. She resolved to use even small things as gifts to bring others in.

Fred, was insistent on keeping his old cubicle. It seemed like it would hold everything up until Dan suggested that for the next few months, they could let Fred have his cubicle. The rest would adopt the new plan. They would evaluate at the end of a trial period and see what had been learned. It’s amazing how well that worked. Because Fred felt that his concerns were being addressed, he was not so openly resistant, and it only took a short time before he realized that having the individual office available whenever he needed it was going to work just fine for him. He began to spend more time in the open environment. The rest of the team didn’t make a big deal out of it, but just welcomed him whenever he decided to join them.

Karl was nervous about this meeting with Dave, the customer rep. He knew there was no way his team could deliver full functionality by the end of June. He’d been thinking about a way to convince Dave to work with them but he wasn’t sure it would work. He started his presentation: “Thanks for hearing us out, Dave. By now you know that we’re going to be at least six weeks late but I’m hoping that I have some good news to balance that. I believe that what you really want is the database functionality and I’m going to offer early delivery on that. That piece is complete and just needs a small adjustment to the user interface to be ready for use. We will have it in a couple of weeks.” Dave looked thoughtful and replied, “I think that would work for us. We really need that database functionality, and having it early is good news, but I would like to be sure that if we let the final date slide that there will be no further slips in the schedule.” Karl smiled, “Thanks, Dave. I think we are very close to meeting all the requirements. I realize that by asking you to take delivery on this database piece we are not taking liberties with our commitments. We want everyone to be happy with our product. We will have that final delivery by the end of August. Thanks for being open to our proposal.”

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Myth Buster
There are always myths around every change initiative. Document those and address them in a timely and forthright manner.

The great enemy of the truth is very often not the lie - deliberate, contrived and dishonest - but the myth - persistent, persuasive and unrealistic.
(John F. Kennedy, 1962)

You are an Evangelist or Dedicated Champion who has focused on the facts about the innovation, its benefits, and the particulars about its transition into the organization but, despite your best efforts, there are misconceptions flying around the organization.

If we hear someone bring up a misunderstanding about our ideas, we usually address it head on with the person who is expressing the concern. However, a false impression in one person’s mind is usually a sign that misconceptions are shared by others.

People who hold misconceptions may not be aware that their ideas are incorrect. But, because we build new knowledge on current understandings, these misconceptions can have serious impacts on learning about a new idea. Inaccurate information is often repeated until it achieves a certain myth status. These myths need to be debunked before they take a strong hold and create even more concern and anxieties.

Therefore:

To get the word out about what the innovation isn’t as well as what won’t happen as a result of its introduction into the organization, create a simple list.

“…life is complicated. Lists aren’t.” Address the explicit misconceptions you know as well as any others that may be looming. Each bullet point can include the following:

The <innovation> is not… because…
The change initiative will not… because…

Give Just Enough explanation for each one. Keep it brief, and include the name of a contact person or other resources the reader can consult for additional information.

Be clear. People are open to suggestion. Calling attention to negative things can validate them. Make sure your list is designed in a way that clearly points out these things are *not* true. Use positive language and don’t repeat the myth beyond its initial mention in the list.

Ask for Help from the Champion Skeptic and others to create the list—they are likely to know about the fears and other negative talk surrounding the innovation.

Post the message In Your Space. Create a web site for the change initiative, include it your presentations or Town Meeting about the new idea, or send it in an email to everyone in the organization. You may also want to prepare a one page clear handout to share at The Right Time with anyone who approaches you with incorrect impressions and suspicions about the new idea.

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This pattern can help create a clearer understanding of what the new idea isn’t. It allows people to build their knowledge on the truth rather than on their misunderstandings.

However, some people do not like to be proven wrong, and will continue clinging to a misconception despite any evidence to the contrary. When you’re dealing with people who really want to believe something, attempts to change their minds may only have the opposite effect of strengthening their position, especially

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4 Misconceptions in Science: http://www.indiana.edu/~w505a/studwork/deborah/
if you’re using facts as opposed to opinions. However, you have given them something to think about and they may come around later. For strong opinions, use Fear Less.

During the battle for health care reform in the United States, rumors and misunderstandings often created fear about things like “death panels” or “rationing” or the crushing of small businesses. The president of the United States, Barack Obama, attempted to “debunk the more outrageous myths” in his weekly address titled “Myths and Morality in Health Insurance Reform.” In addition, web sites such as the following attempted to explain the truths behind the myths: http://harryreid.com/content/reform-myths/

Simon, a scientist at the National Climatic Data Center, was concerned with the compelling, yet inaccurate, climate change information distributed by less than credible people and organizations. He asked about “effective strategies to pursue to counter this” and a consultant recommended the following: “Your question is a common one. I have recommended to other people that they create some sort of “breaking the myths” web site. For example, the site could summarize, point by point, what people like “plucky captain Jean Luc Picard” claim and then provide the true wisdom for each point. Then, there’s an important step 2: You must do all you can to get that site out there-- to encourage people to read it. For example, NCDC could include the URL in all their presentations, links on their sites.”

A web site with five of the most common math misconceptions helps elementary students eliminate these tightly held mistaken beliefs. It states that “elimination of mistaken beliefs about math concepts is critical.”

To investigate 16 claims that surfaced after the 9/11 event, POPULAR MECHANICS assembled a team of nine researchers and reporters who consulted more than 70 professionals in fields that form the core of the magazine, such as aviation, engineering and the military. The resulting report, Debunking the 9/11 Myths: Special Report, reported that they were “able to debunk each of these assertions with hard evidence and a healthy dose of common sense… Only by confronting such poisonous claims with irrefutable facts can we understand what really happened on a day that is forever seared into world history.”

Since 2002, the ”MythBusters” t.v. show has declared more than 300 myths confirmed, busted or plausible. They use the scientific method to conduct controlled, albeit sometimes messy, experiments. Each episode typically tackles between two and four myths, usually within a related topic. The original idea was to have fun and educate -- to have science meet entertainment. But the business of busting myths has proven to be popular. "MythBusters” quickly became one of Discovery Channel’s highest-rated shows with more than 10 million viewers tuning in worldwide every week.

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Go To Person

Identify key people who can help at critical points in your change initiative.

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9 http://www.popularmechanics.com/technology/military_law/1227842.html
"You know," said the newly appointed CEO of a large company, "I have more than 1000 people in my head office organization; 900 can tell me something’s gone wrong, 90 can tell me what’s gone wrong, 9 can tell me why it went wrong, and one can actually fix it!" 11

You are an Evangelist or Dedicated Champion who is willing to Ask for Help. There are helpful people in your organization, but they are busy people, often with little time to invest in supporting your idea.

Your “to do” list is growing. You don’t have the time, resources, or talent to tackle all of the action items alone.

There are many things to do. You know you need to Ask for Help. You need people who can be trusted to provide a particular service or deal with a particular problem. But where do you start?

Therefore:

Make a list of the things you need to do in the next milestone of your Step by Step initiative. Create a Concrete Action Plan. Next to each item, write the name of the person (or persons) who have the specific resources or ability to help you get that item done.

Look for people who can provide what you need or can facilitate the resources. They will have the necessary skill and knowledge, the authority, influence, and/or ability to cut through red tape, or have access to the connections that can open doors and get the job done. They understand the task you are bringing to them and will make the solution happen.

A go-to person must also have the time and motivation to help. Take the effort to cultivate their interest in the project and the task you are asking of them. Have your general Elevator Speech ready, but use Personal Touch to address their questions and concerns—then you are in a better position to Ask for Help. If you don’t know them well, solicit the assistance of a Bridge-Builder. Be mindful of any established processes, so that you don’t ruffle any feathers.

Give each go-to person a palpable, do-able task. Respect their time by providing as much lead time as possible. Even if you don’t need their help immediately, discuss your plans and the timeline—then Stay in Touch and give them progress reports. Try to fit your schedule into The Right Time for this person. This will make it more likely that they will be available when you need them.

Even when you check “get go-to people in place” off your list, keep a back-up plan in mind. Think about what you will do if these key people disappear. Be careful about cultivating too much dependence on a limited amount of people. You don’t want to burn them out and risk that they could disappear.

This pattern creates a way to expedite whatever it is you must get done. You’ve reached out and located the key people you need to move forward. And you are helping to build a Group Identity for your initiative.

However, you could potentially become known as the person who bugs people too much. Individuals may run when they see you coming because they think you will ask a favor. Just Say Thanks to help go-to people feel good about themselves; allow them to be an example to others by publicizing the Small Successes that are made possible through their assistance.

Sally was planning a Big Jolt event. Finding an appropriate location and a budget for food would be a challenge, but if anyone could figure it out, the admin, Jennifer, could. Sally planned to ask Adam to make sure the technical support was in place and enlist William and Lisa to spread the word among the key people on their teams. She thought of Harry, and his interesting

artwork, as a possibility for a gift for the speaker. Then, she set off to talk with each of these go-to people.

Zahrah was trying to get a daycare center established in her organization. At the start of each milestone, she listed the tasks that needed to be done and, beside each one, she wrote the name of the person she needed to contact for information, resources or for other kinds of help. Then, she made phone calls or visits to each one of them to discuss her needs. Once this was done, it felt good to know that all her go-to people were in place to make the next milestone a reality.

Maury was a member of a geographically-dispersed conference planning committee consisting of many volunteers who held a variety of different roles. So, as he listed the specific tasks that needed to be done in each phase of the planning process, he noted the name of the other volunteer(s) that needed to be contacted to get each of his tasks accomplished.

A “go to player” on a team is the person on a sports team who always gets the ball or puck and is counted on to score, especially in a close game.

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Imagine That!

To move your change initiative forward, engage people in an exercise to imagine future possibilities.

The ABC News Special titled “Earth 2100” (airing in June 2009), depicted an imaginary, but possible, scenario in the year 2100. ABC introduced it as follows: “To change the future, first you have to imagine it.”

You are an Evangelist or Dedicated Champion who is talking about the new idea that is likely to happen in the future, but people are focusing on the visible difficulties surrounding the idea rather than the potential outcomes. This inhibits their ability to understand how the new idea can impact the future.

It is hard for people to understand how a new idea will fit into the work they will be doing in the future. They usually find it easier to remember the problems of the past and concentrate on the challenges facing them in the present.

You want people to believe that a new beginning, a better world is possible and could be just around the corner. You want people to understand the past, but focus on the future.

However, you don’t always have the resources to do a Trail Run and you rarely, if ever, have the ability to perfectly simulate what a new idea will provide. Yet, a visualization, a mental rehearsal, is always possible.

Therefore:

Ask people to imagine the future. Begin with “What if…”

Encourage them to think out loud and fill their mental imagery with many different kinds of sensory detail. How will things look when the new idea is a reality? What kinds of things will we hear? What will it allow us to do?

Tell the story. How could the events unfold? Replay the steps that got us to the problem as a Wake-up Call. Then, continue the story with the potential ways a new idea could address the current problem(s).

If you want to take it a step further, ask them to consider how they would feel if a new idea allowed things to change… relief?.. satisfaction?… confidence?

In addition to talking about the positive outcomes, imagine the risks of moving forward with the change-- what side effects could

12 Heath & Heath, Made to Stick, 211-212
13 Heath & Heath, 211
surface, and what might we be able to do about them?

Imagine the other side too-- what could happen if we don’t change?

This pattern allows you to fit a new idea into the future. It helps everyone imagine the possibilities and how they are relevant to their daily existence. By focusing on the future, people may be more motivated to let go of the past. This engages them in the potential for change and creates a fertile pool for making it a reality.

But don’t get carried away. Imagining can be fun and, as a result, you may tell a story about an unrealistic future. This will only create problems for you later if the imagined does not match the future reality. Be sure that the story is Tailor Made to what the organization and/or the person can and cannot do.

In order to get employees interested in using new project management and social networking software, the CIO’s presentation included a variety of specific scenarios describing when, where and how this software could be used in existing and future projects. The attendees nodded and responded with potential scenarios of their own: “Oh, and I can also see how this software can be used in <here>”

A church was facing a new, uncertain future after the unexpected loss of the head minister. The deacon held a Town Meeting in which he asked all attendees to choose to participate in one of three groups that represented their personal feelings: anger, confusion, hope. The “hope” group was asked to spend time imagining a new, better and exciting future for the church. When this group reported the outcome of their exercise, smiles and nods appeared among the people in the other two groups.

Gary often does an imagery technique with his clients who are depressed. He asks the person to close her eyes and describe herself—what color is she wearing, how does her facial expression (eyes, mouth, etc) look, how does her stature appear, how are her friends reacting to her, what does she do every day, etc. Then, he asks this person to imagine herself in a year, prompting her with the same questions about facial expression, stature, lifestyle, etc. Afterwards, they have a discussion about which of the two images is preferable and what Concrete Action Plan the person can make in order to begin moving towards the more desirable image.

When one small company gets “stuck” the CEO gathers his staff and asks them to let their imaginations run wild for awhile. How can we move forward? What are all the possibilities? Once all the ideas have been expressed, the CEO then guides them in dialing back to realistic options and an outline for a Concrete Action Plan.

The Piedmont Community Design Forum was established by four architects to create a public discussion before a new community is built. The planning process always begins with a request, to both the developers and the neighborhood residents, to imagine what their ideal community would look like. From this starting point, everyone can begin to compromise and work out the details for a new environment.

Bill is a diver in his personal life and a risk consultant in his professional life. He tells us: “A given person can ‘reframe’ their expectations about an unknown future, through visualization, from dread to excitement. As a diver, for example, I would envision an upcoming competition with me choking, or with me nailing my dives. Similarly, an employee can use visualization and rehearsal to prepare for the ‘best case outcome’ (versus the opposite) for an upcoming presentation to more senior executives. If they are going to be thinking obsessively about a scary situation, they might as well focus on best case outcomes instead of worst case.”
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