

Cultivating Capacity

Preparing the Field for Change



INCLUSION

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0.1

John O'Brien compiled this guide.

Version 0.1

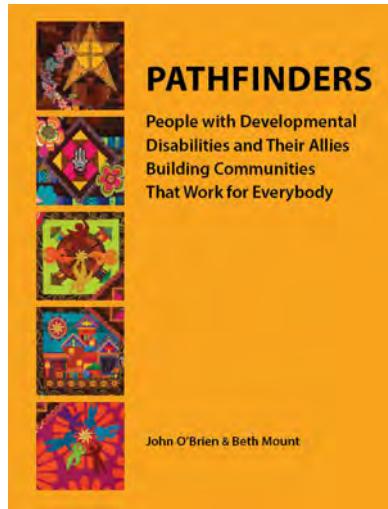
2016

These books explore the purpose and the process of change that the practices in this guide serve.



*Creating Blue Space:
Fostering Innovative Support
Practices for People with
Developmental Disabilities.*

www.inclusion.com



*Pathfinders: People with
Developmental Disabilities
& Their Allies Building
Communities that Work
Better for Everybody.*

www.inclusion.com

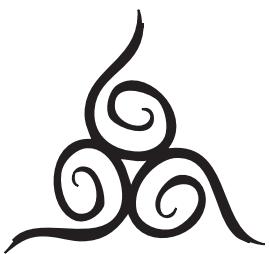
The content of this guide is adapted from materials created by The Presencing Institute. Adaptations apply the practices to organizations seeking to improve their capacity to offer person-centered support to people with intellectual and developmental disabilities and their families. Links to the original instructions for these practices are included.

To better understand Theory U start at www.presencing.com. There is a short introduction in the context of social invention with people with developmental disabilities at <http://goo.gl/Zrsdd8>

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New capacities develop only when
we cultivate a healthy
social field

A wide-angle photograph of a plowed agricultural field. The dark, moist soil is tilled into long, parallel rows that recede towards a distant treeline. The sky above is a clear, pale blue with a few wispy white clouds. The overall scene conveys a sense of preparedness and potential.

Social Field: The structure of relationships that shapes awareness and attention and so the pathway along which new capacities emerge.



More and more people with developmental disabilities who have typically been served as one of a supervised group expect to move in self-directed ways into their own homes, real jobs, life-long learning and the satisfactions of joining in civic and leisure pursuits with their fellow citizens. These great expectations challenge organizational capacity to partner with people to co-create individually tailored assistance. Developing this capacity is constrained by funding structures focused on controlling costs and promoting change through compliance regimes.

Most organizations are successful at producing more of the same responses that have met past expectations. Without intentional investment in cultivating a healthy social field the potential for trusting and generative relationships will die and blow away and attempts at positive change will not take root.

More than modifying practices or adding new services, real change calls on all those involved to reconsider their understanding of their purpose and their work and answer the call of new possibilities.



Every person has a higher self that wants to develop. Every place has possibilities for supporting better lives that want to be born. The sign of a healthy social field is growing capacity to see the highest future possibility in people and places and act as if that possibility matters. This capacity to sense highest purpose grows deeper and more fertile through intentional work among and within people.

Organizations create the conditions for a healthy social field when they invest in **design teams** that bring diverse people together to co-create new ways to assist people with developmental disabilities. Capable design teams include people with developmental disabilities, family members, direct support workers, people in professional roles and managers. Each design team will cross boundaries and build new relationships as it learns. An organization may have a single design team or a network of them.

Necessary organizational investments in design teams include...

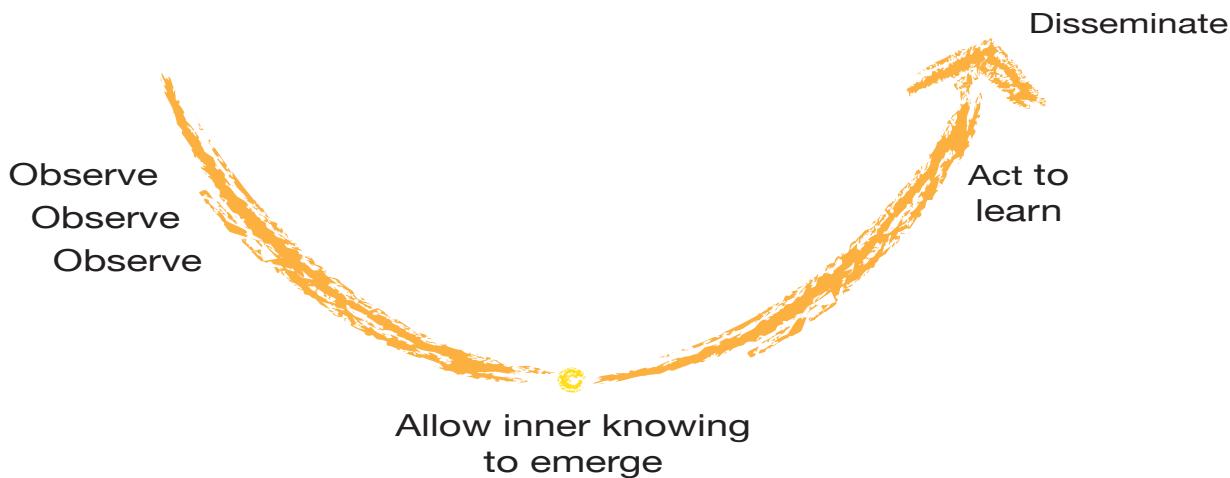
- ...authority to cross boundaries and act as social inventors
- ...access to the organization's senior management to negotiate necessary changes
- ...time to build relationships and discover
- ...flexibility to learn by trying new things
- ...control of enough organizational resources to make changes, revise and build on what works
- ...opportunities to connect with other social inventors

Design teams cultivate a healthy social field by continually improving their ability to follow two patterns that guide social invention. The first pattern guides the process of change and the second develops collective intelligence.

What wants to be born with our help?

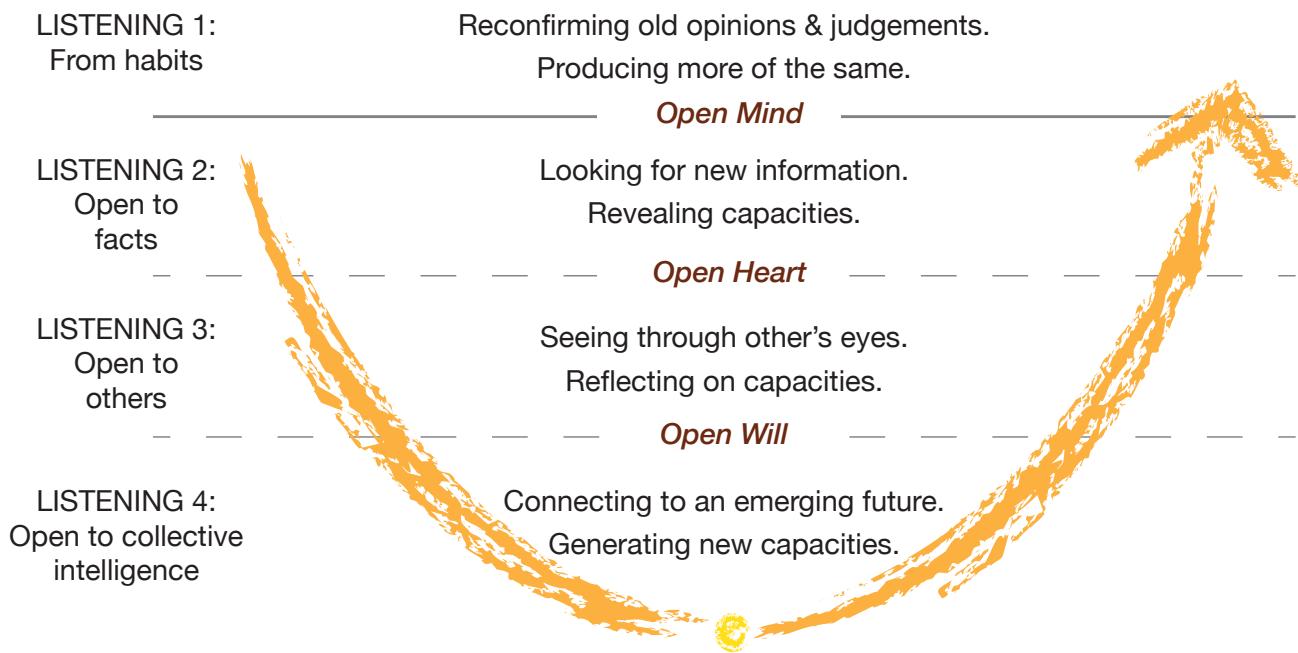
The first pattern guides the design team's overall approach to developing the social inventions that make it possible for people with developmental disabilities to compose lives that they and the people who love them have good reasons to value.

The design team intentionally steps outside the routines and relationships that successfully reproduces more of the same. They avoid the trap of jumping to solutions and make time to observe more of what is present in their organization, in their discipline and in their community. They take time to make sense of what they have come to know and to allow an appreciation of highest purpose to emerge. They avoid the trap of getting stuck in talk and learn by crossing boundaries and trying new ways. Then they share the seeds of possibility and what they have learned about how those seeds can grow.

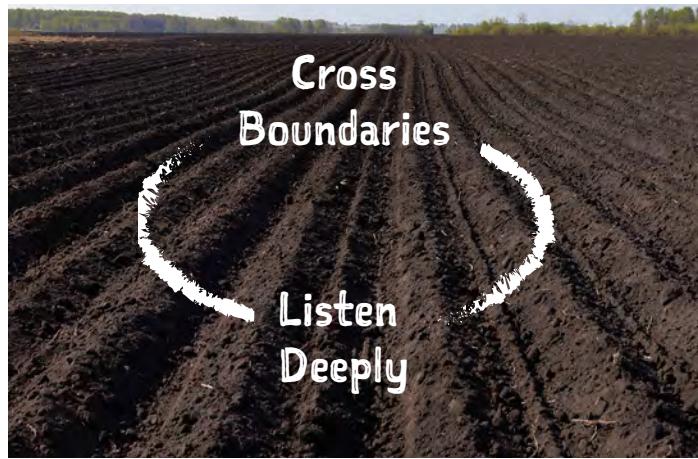


What is our highest purpose?

The second pattern increases the design team's collective intelligence as they seek to listen and sense at deeper levels. They practice deep listening among themselves and with those they meet. They intentionally develop their ability to respond with every organ of knowing by cultivating an open mind, an open heart and an open will.



Watch a presentation on listening by Otto Scharmer www.youtube.com/watch?v=eLfXpRkVZal



A healthy social field develops as design team members intentionally cross the boundaries that separate people with developmental disabilities from contributing social roles. These boundaries are emotionally charged. They mark sites where (unconscious) prejudice excludes people from opportunities. They keep the exercise of power-over people with developmental disabilities hidden behind rules and role definitions and free to operate out of sight. These boundaries indicate where something needs to die and something new needs to be born in organizational and personal life

Deep listening brings design team members across boundaries as they purposely step outside the places and people who make up their familiar world and create opportunities to enter into dialogue with others. This kind of listening takes discipline because exclusion and power over others have three powerful defenders who show up as familiar voices in our minds to distract us from listening deeply.

The Voice of Judgment (VoJ) closes our minds. It keeps a person we could learn from at a distance by trapping us inside a closed circuit of what we already think we know. Everything we hear and see is passed through filters that reject anything new or different as “wrong”, “unrealistic”, or “impossible.”

The Voice of Cynicism (VoC) closes our hearts. It extinguishes empathy by dismissing the possibility of meaningful action with the other person. Constructive responses to a person’s dreams or to injustices the person experiences are doomed to failure, so letting our hearts be moved by another’s circumstances or desires for a better life is setting ourselves up for disappointment.

The Voice of Fear (VoF) freezes our will. What’s called for asks too much of us. Letting go of what needs to die involves too much loss. Moving into the new exposes us to too much uncertainty and risk.

These defenders against deeper listening usually work so fast that we don’t even notice that we have locked ourselves in a more-of-the-same loop. We imagine that we are listening to the other person when we are trapped in our own heads. The key to open the locks: notice the defender at work and let its effects evaporate as you return attention to the other person’s contribution to your understanding. This takes discipline and practice. Use the table on the facing page to reflect on the level of listening you achieve in an interview or a design team meeting.

Level of Listening	Experience	Result
Listening 1 downloading	Just what I expected.	No change or small changes in understanding. Mostly a repeat of the same ideas.
<i>Open Mind expresses curiosity and quiets the Voice of Judgment</i>		
Listening 2 debating	I became aware of some new facts and ideas that challenged my assumptions and shifted the way I make sense of the situation.	Taking account of new realities; better informed. More aware of assumptions, new ideas and alternative ways to understand current reality.
<i>Open Heart activates compassion and overcomes the Voice of Cynicism</i>		
LISTENING 3 dialogue	I have seen the situation, and my place in it, through the eyes of someone whose experience is different from mine. I have a new sense of how another person experiences the situation and how they feel it. My own feelings resonate with those of someone different from me.	Awareness of real differences in experience and evaluation of the situation; new perspective; better understanding of aspects of the situation that have been hidden or avoided.
<i>Open Will draws on courage and calms the Voice of Fear</i>		
LISTENING 4 collective creativity	I am not the same person now than I was when I entered this conversation. Together we generated understanding and possibilities that did not exist when the conversation started.	A growing sense of the highest possibility in the situation and of the contribution I can make.
<p>The table is based on a video on levels of listening presented by Otto Scharmer in the edX course, <i>U.Lab: Transforming Business, Society & Self</i>, 21 January 2015.</p>		



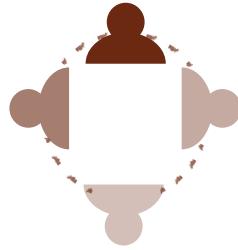
Investing time and attention in listening deeply to a diverse network of people in a variety of settings makes two contributions to the change process

- It builds a healthy social field by connecting the design team to a growing network of people through respectful listening.
- It creates knowledge to inform the design team's discernment of their work in bringing the new to birth in people's lives, in their community and in their organization. This discernment happens in the next moment of the process, **presencing**.

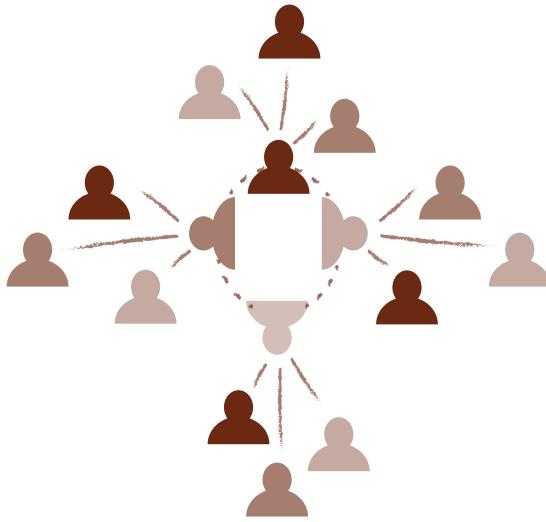


Grow the design team by listening for desire to discover and create the new

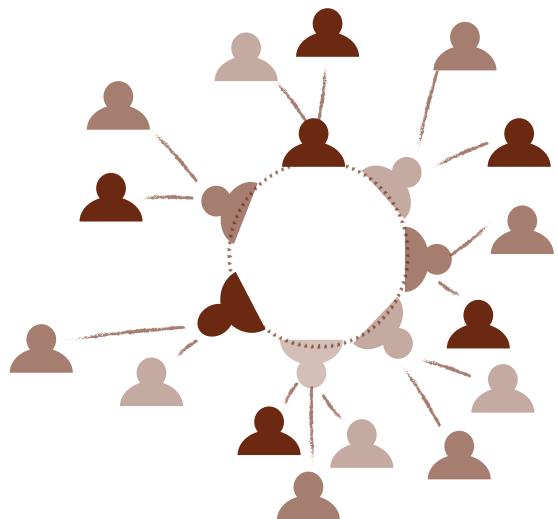
Begin with a small core team of respected, interested people with different roles and perspectives.



Listen deeply to people with diverse experiences of and ideas about current reality and desirable futures for themselves, and their community and the contributions the organization can make to moving toward those futures.



Add members to the design team as you identify people with a strong desire to be part of the work of bringing the new into being.



**Use the four practices on the following pages
with a growing network of people
to build up a fertile social field**

Dialogue Interview

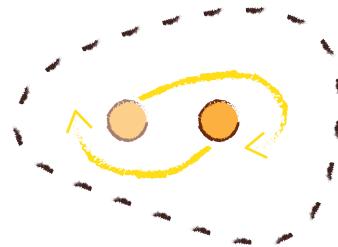
A Dialogue Interview is a **reflective conversation**, open to insights into the experience and understanding of the person giving the interview. Open as well to thinking together in a way that allows seeds of new possibility to emerge. The listener is authentically interested in the other's perspective and thinking and willing to follow the thinking that develops in the moment. The listener's intention is to build trust with those affected by change and connect them to the work.

Consider inviting interviews with...

- People with a track record of social invention and leadership in their own lives, in their community, and in the organization.
- People who hold the history: organizational founders & past leaders; organizational elders (especially people with developmental disabilities & families); community elders.
- People whose judgment and ideas others respect.
- People opposed to change: voices for preservation.



Imaginatively cross boundaries: direct support workers interview board members; managers interview direct support workers in another organization.



See through another's eyes

Be mindful

- Your purpose is to bring out the best in the person who is giving you the interview. Suspend your Voice of Judgment and open your heart to the person so you can see the situation through their eyes.
- Figure out a few open ended questions to open and guide the conversation. Then go with the flow, access your ignorance by attending to and trusting questions that occur to you and finding good moments to ask them.
- Follow the conversation as it develops. Let go of any anxiety about being in control to make room for the person giving the interview to discover new connections and, perhaps, for moments of shared thinking.
- Make the most of presence –quiet, appreciative openness to the person in front of you– and silence. Don't interrupt brief moments of silence, but stay present. Notice and let go of distractions that take you out of the conversation.
- Listen for and welcome glimpses into the best future possibility for the person who is giving you the interview and for the whole situation you share with them.

Read transcripts from a collection of dialogue interviews with remarkable people at www.presencing.com/presencing/dol

Alternative directions for dialogue interviews at www.presencing.com/tools/dialogue-interview

Steps

- Decide whether there will be one or two listeners, who the pairs will be and who will take the lead.
- Make the invitation. Think of a way that suits the person to briefly orient them to the conversation and to the design team's work. Share your reasons for asking this person for an interview. You are not there to sell or persuade but to listen and learn. Be clear about the importance of this person's potential contribution to the design team's work.
- Consider the person's convenience and arrange a comfortable, quiet place and set aside 30-90 minutes for the interview.
- Gather and review information about the person and their work. If the person giving the interview receives services do not read and human service records.
- Thinking about what you now know about the person, frame a few open ended questions and choose a question to start the conversation. Let the conversation develop; don't get stuck in prepared questions.
- Ask who else the person giving the interview would suggest that you engage in conversation.
- Give yourself 15 minutes or so of quiet before the interview to renew your intentions.
- Orient the person to the interview by briefly reviewing your invitation and intention. Get permission to take notes and note the resolution of any concerns about confidentiality, attribution of what the person says and requested follow-up.
- Enjoy the conversation, even when some of it may be challenging or difficult to hear.
- Schedule time immediately after the interview to reflect on the interview. Consider using the Reflection pages that follow.
- Send the person who gave you the interview a thank-you note the next day.

Possible Questions

- What are some of the important moments in your life journey that have brought you to this place or role (of leadership, of elder status, of creator of social invention)?
- What moved you to set out (to found this organization, to take this leadership role, to take this action to get your own home or job)? What were you seeking to accomplish?
- Where do you experience a world that is dying?
- Where do you experience a world that wants to be born?
- When big challenges faced you in the past? What helped you to deal with them?
- What has been some of your most important learning about making change (creating social inventions).
- What future possibilities do you think it is most important to invest in?
- What are the biggest challenges you (and/or your organization) face now? What do you think is the source of these challenges?
- What breaks your heart?
- What keeps you awake?
- What questions hold the most interest for you?

Reflection

When, where, with whom:

Anything I need to follow up?

What surprised me. What was unexpected?

What touched me... resonated with me personally?

What I want to carry forward to our team's consideration of what we need to let go of... what needs to die:

What I want to carry forward to our team's consideration of what want's to be born with our help... the highest future potential in our situation:

What I noticed about myself as a listener. What messages from VoJ, VoC, VoF hooked me? What brought me back to presence?

Level of Listening	Result
Listening 1 <i>downloading</i>	No change or small changes in understanding.
Listening 2 <i>debating</i>	More aware of assumptions, new ideas and alternative ways to understand.
Listening 3 <i>dialogue</i>	New perspective; deeper understanding of aspects of the situation that we have hidden or avoided.
Listening 4 <i>collective creativity</i>	Growing sense of highest potential in the situation and in myself..
<i>x the deepest level of listening you reached in this inquiry ↑</i>	

Sharing place and time

Sharing place and time allows design team members to absorb knowledge by immersing themselves in a different environment. The design team member observes and constructs a rich account of the setting and experience of a person who offers the gift of sharing their space.

Consider sharing place and time with...



- People with DD who have benefited from individualized supports and live in their own homes, hold real jobs, are engaged in learning or are civically active.
- People with DD in group settings: group homes, day program, community experience programs.
- People with DD in more restrictive settings: nursing homes, institutions.
- Families who provide substantial assistance to people with complex needs.
- Direct support workers in group and individualized services, including those who assist people with complex needs.

Pay particular attention to sharing time and space with people who are usually without voice.



Sense place and time

Be mindful

- Your purpose is to learn what you can from sharing a brief time with others in a place that shapes their everyday life experience. You are constructing a story of the interaction of person and place, the ways this setting supports or inhibits the person's expression of their best, most capable self.
- Make the most of presence –quiet, respectful openness to the person in place. Let impressions come to you and take form inside you. Don't feel you need to make things happen, but let the place happen to you by observing quietly as much as you can. Observe the external shape and flow of place and time rather than interview to learn about people's description of their experience.
- You can't know what another person is experiencing but you can do your best to take the perspective of another's role. Put yourself in the position of a person receiving service or a direct support worker and access your thinking, feeling, and imagining.
- Be open to glimpses into the best future possibility for the person and place and to the qualities of place that make this possibility visible.
- Be open to notice whatever about the place, activities and interactions might cover up the person's capacities and hold back development of their best self. Don't let the Voice of Judgment distract you from noticing what is there as fully as you can. Notice any explanations you supply to justify or excuse what you are seeing: judgments about the difficulty of supporting the person, the inadequacy of funding, etc.

Based on Shadowing. Instructions at www.presencing.com/tools/shadowing-0

Steps

- Identify places you can learn from and decide on the role that will focus your observation: person who communicates with us; person who lives in a group home; mother who lives with and provides assistance to a person whose behavior can be challenging; direct support worker who shares a person's home.
- Make the invitation. Think of a way that suits the person and setting to briefly orient them to the design team's work and your interest in learning by sharing time with them. Be clear that your aim is to understand an ordinary time in the person's life, not to evaluate or recommend.
- Consider the person's schedule and negotiate the times when you could learn the most. It generally works well to share...
 - ...a whole day in a day program, community experience or institutional setting
 - ...time on and off the job when a person has a community job
 - ...a morning and evening or a weekend day where a person lives
 - ...a typical activity when a person is civically involved, maybe more than once.
- Give yourself 15 minutes or so of quiet before the interview to renew your intentions. Imagine the best possible outcome of the day for yourself and those whose time and space you will share.
- Be respectful and friendly. As appropriate to the place and activity either find an unobtrusive place to observe or join in as quietly as possible.
- Don't interrupt what is happening. Converse or ask questions during breaks or quiet times.
- If the place and activity allows, make notes. Clearly distinguish description of what you see and hear from what you think and feel.
- Schedule time immediately after your observations to reflect. Think about what surprised you; what inspired you; what made you uncomfortable. Consider using the Reflection pages to record your key ideas.
- Send those who make the sharing possible a thank-you note the next day.

*You can observe a lot just by watching.
–Yogi Berra*

Reflection

When, where, with whom:

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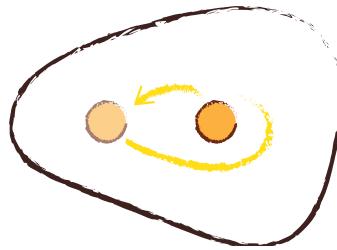
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Listening 4 <i>collective creativity</i>	Growing sense of highest potential in the situation and in myself..
<i>x the deepest level of listening you reached in this inquiry ↑</i>	

Stakeholder Interview

A Stakeholder Interview is an opportunity to discover how the organization's work looks from the point of view of the people who whose lives are shaped by it, what they value and what they would change.



*See your work through
other's eyes*

Be mindful

- Your purpose is to learn as much as you can about how this person experiences your organization. Suspend your Voice of Judgment and open your heart to the person so you can see the organization's work through their eyes.
- Figure out a few open ended questions to open and guide the conversation. Then go with the flow. Access your ignorance by attending to and trusting questions that occur to you and finding good moments to ask them.
- You are looking for this person's truth about something that also matters to you: the performance of your organization. Notice what you want to disagree with or what makes you uncomfortable in what you hear. Note and then let go of the explanations and justifications that come up in your mind in response to disconfirming or uncomfortable statements. You can also get pulled into your own mind when you hear something you agree with: come back to the person and listen more closely for what they are saying about how it is for them.
- Make the most of presence –quiet, appreciative openness to the person in front of you—and silence. Don't interrupt brief moments of silence, but stay present.
- Listen for and welcome glimpses into the best future possibility for the person who is giving you the interview and for the whole situation you share with them.

Consider inviting interviews with...



- People with developmental disabilities.
- Family members.
- Legal guardians.
- Employers and landlords for people the organization supports.
- Direct support workers and front line managers.
- Middle and senior managers.
- Board members.
- Staff from other organizations that serve the people the organization supports.
- Managers in the DD system.

Based on Stakeholder Interviews. Instructions at www.presencing.com/tools/stakeholder-interviews-0

Steps

- Make a list of people whose perceptions of your organization's work will help the design team's work. Don't forget people who might be easy to overlook. Notice and discuss any reluctance to offer someone an interview.
- Decide whether there will be one or two listeners, who the pairs will be and who will take the lead.
- Make the invitation. Think of a way that suits the person to briefly orient them to the conversation and to the design team's work. Share your reasons for asking this person for an interview. You are there to see your organization's work through that person's eyes..
- Consider the person's convenience and arrange a comfortable, quiet place and set aside 30-60 minutes for the interview.
- Thinking about what you now know about the person, frame a few open ended questions and choose a question to start the conversation. Let the other persons account of your organization's work develop; don't get stuck in prepared questions.
- Give yourself 15 minutes or so of quiet before the interview to renew your intentions.
- Orient the person to the interview by briefly reviewing your invitation to the interview. Get permission to take notes and note the resolution of any concerns about confidentiality, attribution of what the person says and requested follow-up.
- Open your self to the person's perceptions, even when some of what they may be challenging or difficult to hear.
- Schedule time immediately after the interview to reflect on the interview. Consider using the Reflection pages that follow.
- Send the person a thank-you note the next day.

Possible Questions

- When our organization is at its best, what does it do for you? What happen for you when our organization provides just what you need?
- How could our organization fail you or let you down? What does or could happen when we fail?
- When you think about the future what would you like to be different for you? How could our organization help with that?
- What worries you or makes you afraid? What can we do to help?
- What criteria do you use to use to assess the value of what our organization provides for you?
- If we could make two changes to our organization, what changes would make the most positive difference for you?

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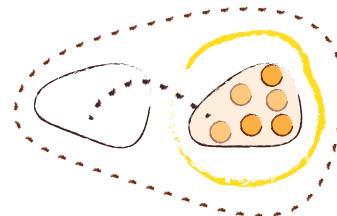
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Learning Journey

A Learning Journey is an opportunity to widen the horizon of possibility by visiting places outside the design team's usual experience where people are finding new paths to individualized supports for rich lives in community. It gives design team members the chance to explore different approaches to common purposes and, perhaps, to see the benefits of transformed supports. It provides new ideas to adapt and try.

Consider learning journeys to...

- Different organizations who share a common purpose and have developed innovative approaches to individualize support to people living in their own homes, holding community jobs, participating alongside other citizens in community life and engaging in lifelong learning.
- Organizations with contrasting approaches to assisting people with complex or challenging needs to take contributing community roles.
- Organizations engaged in transformational change.
- Organizations that have invented effective forms of developing direct support workers.



See new possibilities in a wider social field

Be mindful

- Your purpose is to expand your sense of what is possible and how the new comes to be. Suspend the Voice of Judgement and the Voice of Cynicism and access your sense of curiosity, wonder and appreciation.
- A Learning Journey expands the social field by connecting your design team to others with a similar sense of purpose who act in a different context.
- Practice three forms of listening...
 - ...listening to others; allowing what others have to offer to touch and influence you
 - ...listening to yourself; attending to what is emerging within you.
 - ...listening to the emerging whole: tuning in to what your wider social field is showing you about your highest purpose and how to move deeper into it.
- Take what you see as a starting point and improvise questions that deepen your understanding.
- Listen for and welcome glimpses into the best future possibility for those you meet for the whole situation you share with them.

Based on Sensing Journeys. Instructions at www.presencing.com/tools/sensing-journey

Steps

- Identify organizations that will provide the design team with a new sense of what is possible and different approaches to move toward those possibilities. Choose two or three and identify what the design team wants to learn from each, based on reviewing available information. Draft some questions for initial orientation.
- Arrange for each chosen site to host small teams of 3-5 design team members for a day or two. The purpose is to understand what people and families the host supports are experiencing as they move into their own highest purpose and the host's way of working.
- Arrange a schedule with the host that will let the visitors experience and learn from as much as possible in the time available.
- Travel to the host's location. Make individual and team time to renew intentions for the visit.
- Team members observe and trust their intuition to ask simple, authentic questions that arise from the moment. Practice deep listening to hold the space for conversations with the hosts.
- Make time for individual and group reflection on the visit. If the visit lasts more than one day, make time at the end of each day. Consider using the Reflection pages.
- Bring what you have learned back to the whole design team.

Possible questions

- What have been most important in clarifying and growing commitment to individualized supports?
- What have been the most important sources of energy and creativity in moving toward individualized supports?
- What have been the most important milestones on your journey so far?
- What issues or challenges are you facing that hold back further movement? Why do you think these challenges exist?
- If you could change just a few things about the DD system, what would you change and why?

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What I noticed about myself as a listener. What messages from VoJ, VoC, VoF hooked me? What brought me back to presence?

Level of Listening	Result
Listening 1 <i>downloading</i>	No change or small changes in understanding.
Listening 2 <i>debating</i>	More aware of assumptions, new ideas and alternative ways to understand.
Listening 3 <i>dialogue</i>	New perspective; deeper understanding of aspects of the situation that we have hidden or avoided.
Listening 4 <i>collective creativity</i>	Growing sense of highest potential in the situation and in myself..
<i>x the deepest level of listening you reached in this inquiry ↑</i>	

Reflection

When, where, with whom:

Anything I need to follow up?

What surprised me. What was unexpected?

What touched me... resonated with me personally?

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