

Cultivating Capacity

A Fieldbook for Strengthening Person-Centered Practices

Session I



INCLUSION

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0.6

John O'Brien wrote this fieldbook, adapting materials from The Presencing Institute.

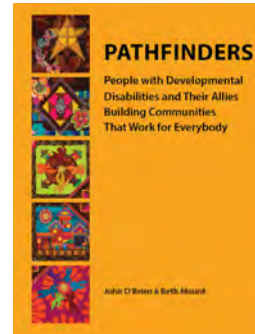
Version 0.6

2020

These books explore the purpose and the process of change that the practices in this Fieldbook 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

This Learning Institute is sponsored by the New York State Department of Health Money Follows the Person (MFP) Rebalancing Demonstration

To learn more about the Person Centered Planning Training Initiative: NYDOHPCPTraining@pcgus.com

For information on Money Follows the Person: MFP@health.ny.gov

For information on the HCBS Rule: HCBSrule@health.ny.gov

Much of 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 who rely on long-term support and their allies. 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 <https://bit.ly/37x3YZ4>

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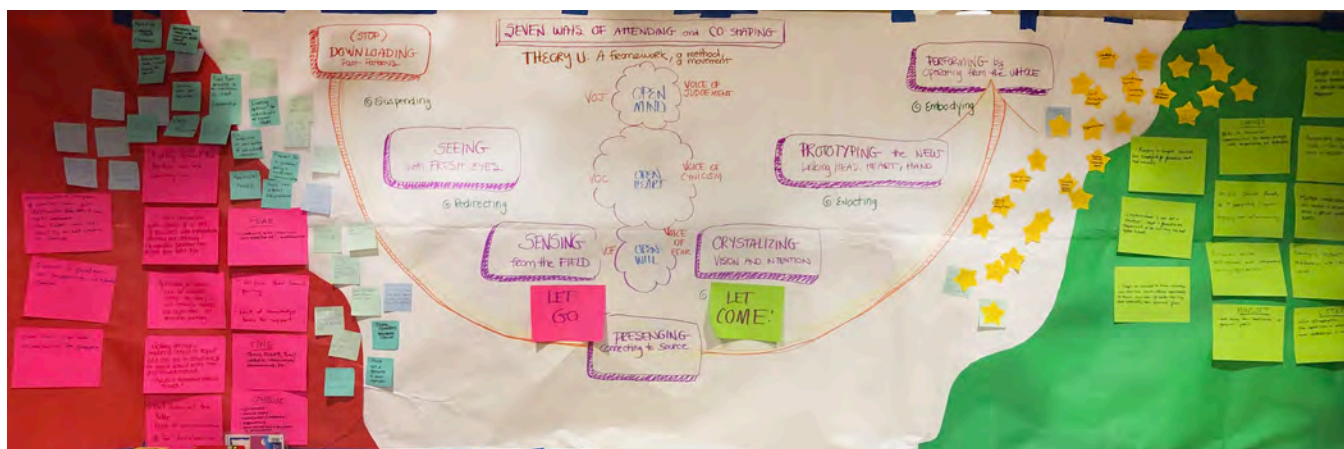


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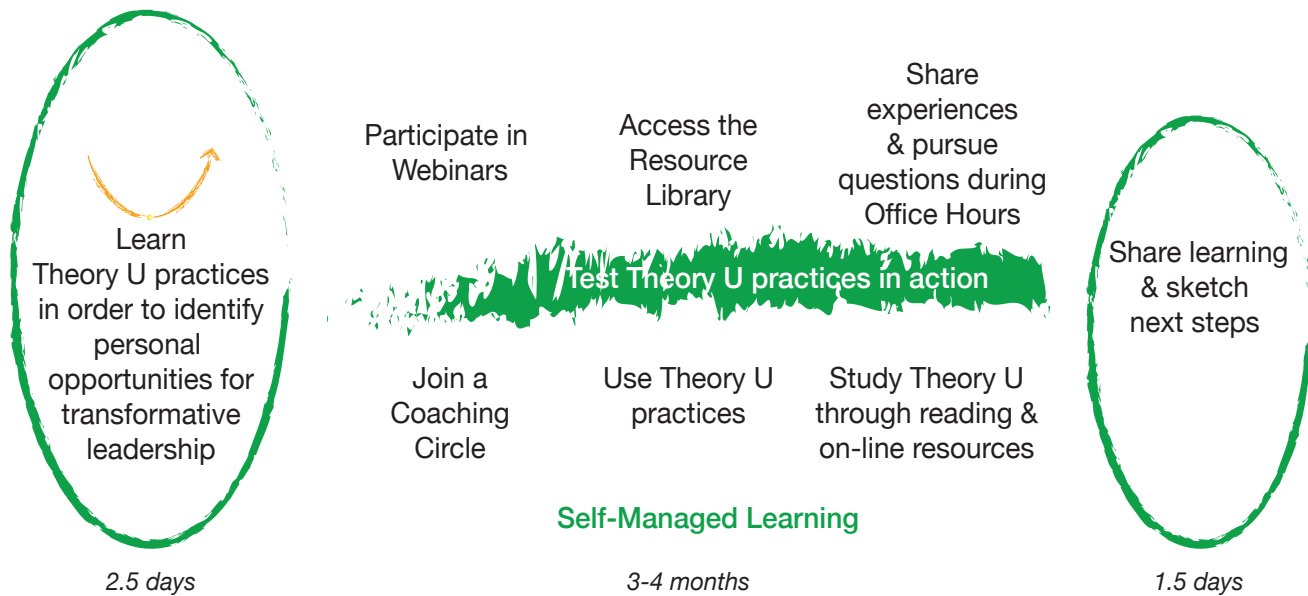
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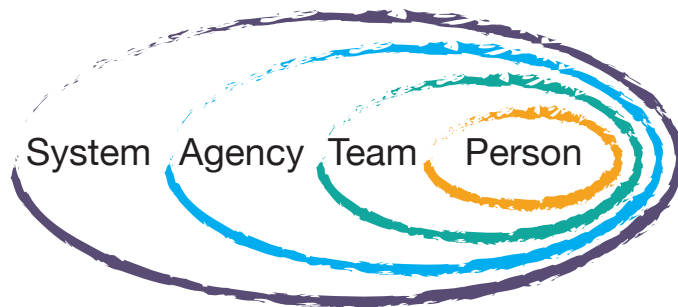
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Learning Institute map



Transformative leadership creates contexts and safe spaces for the voice of the person to emerge and align resources to support a life they, and those who love them, have good reasons to value.



We believe...

- ...all of us who participate in the Learning Institute can increase the benefits person-centered planning offers if we choose to develop ourselves as change makers.
- ...opportunities for personal development and making a difference will show up in the flow of our work if we look for them.
- ...our choices about what we attend to and our level of listening powerfully influence the opportunities we notice and our ability to respond to those opportunities.
- ...we learn what we need to by expanding our awareness and questioning our assumptions; it is wise to quiet the voices of judgment, cynicism and fear and sense our situation as deeply as we are able.
- ...Theory U practices can help.

CMS, a powerful voice in our system, focuses the results of a generation of progress in a call to develop even better capacities to support people to participate in community life. This sets a direction for the work of increasing the impact of person-centered planning.

A Home & Community Based setting is integrated in & supports full access of individuals receiving Medicaid HCBS to the greater community, including opportunities to seek employment & work in competitive integrated settings, engage in community life, control personal resources, & receive services in the community, to the same degree of access as individuals not receiving Medicaid HCBS.

–HCBS Community Rule

Opportunities

How might we offer people the option to live in their own home with the individualized support they need?

How might we support people's engagement in valued roles in community life?

How might we offer people of working age the option to do a paid job in the community?

How might we use person centered plans to increase people's influence on the supports they need to live a community life & access the same community resources as other citizens do?

The questions in the right column express the design challenges that the Learning Institute facilitators read in the CMS rule. Each of us can use the Learning Institute as an opportunity to discern the questions that have meaning for us: what we want to be part of creating as we work to strengthen the benefits of person-centered practice in our own situation.



**To make person centered practices effective in our* system
we need to work
on our system**

Working in our system means making the best possible match between a person’s interests and preferences and the supports they experience within the current capacities of those supports. To individualize supports those who plan with and support a person creatively stretch current routines, policies and structures to their limits.

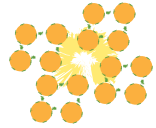
Working on our system means co-creating new relationships, mindsets, structures, policies and practices that expand the horizon of possibility and transform capacity to offer individualized support to community lives that people and those who love them have good reasons to value.

Organizations have a choice of responses to the CMS Community Rule. Those that choose 3.0 and 4.0 levels of response choose to **work on** the system, co=creating new capacities.

	Strategy	Action	Intention	Critical Boundary
1.0	Comply	Sufficient compliance to minimize the impact of external demand from the state	Continuity of current practices & structures	Organization/ MA compliance mechanisms
2.0	Adjust	Adjust practices within current structure & mindset	Better fit between person & practice	Person centered planners/ DSPs & their managers.
3.0	Adopt <i>Best Practice(s)</i>	Modify practice & structure in line with best practice model(s)	Add capability defined by chosen model(s)	Model/ Management – Staff–People who participate, (Family)
4.0	Transform through social innovation	Co-create new capabilities	Disrupt & recreate relationship to source > mindset > structure to increase person’s control & inclusion	Relationship to others: people, allies, community Relationship to self

* People often refer to “The system” as if it were a sort of machine that demands our compliance but frustrates our purposes. This is a legitimate expression of their experience of structures and policies in force but we think it can feed cynicism or resignation. We choose “our system” as a reminder that **we collectively are the system**. We will make better contributions if we see ourselves as actors rather than victims. Positive action begins with a shift in awareness, listening more deeply and co-creating better ways together with a widening circle of others.

Our shared understanding of the CMS Community Rule (World Cafe)



What positive changes in the lives of people who rely on HCB Waiver funded services & supports will we see & hear about as person-centered planning grows stronger?

What challenges do we face in strengthening the positive impact person-centered planning has on the lives of people who rely on HCB funded supports?

The World Cafe is an effective way to find out what a people are thinking about a topic that matters to them. For a free guide to hosting visit www.theworldcafe.com and go to the Store.

Preparing the field for change

New capacities develop best when we cultivate a
healthy social field

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



More and more people who rely on long-term support and their families and allies expect to self-direct the supports they need. Elders expect individualized support to stay in familiar surroundings. Adults who have typically been served as one of a supervised group now 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 capacity to meet expectations for individualized supports happens alongside efforts to better manage costs, assure health and safety, offer support in culturally competent ways and develop a sufficient and competent workforce.

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 simply modifying practices or implementing new service models, real change calls on all those involved –people who rely on support and their allies, those who offer direct support, and those who manage organizations and administer systems– to reconsider their understanding of their purpose and their work and choose to answer the call of new possibilities.

Change team?

For a person, a change team is a circle of chosen people who work together with the person to co-create and act on a person-centered plan. For an organization a change team co-creates better ways to organize and offer support by generating new practices and new structures.



Every person has a higher self that wants to develop. Every community 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.

One way that organizations create the conditions for a healthy social field is by investing in **change teams** that bring diverse people together to co-create new ways with people who rely on long-term support. Capable change teams include people who rely on long-term support, family members and allies, direct support workers, people in professional roles and managers. Each change team will cross boundaries and build new relationships as they learn. An organization may have a single change team or a network of them.

Necessary organizational investments in change 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

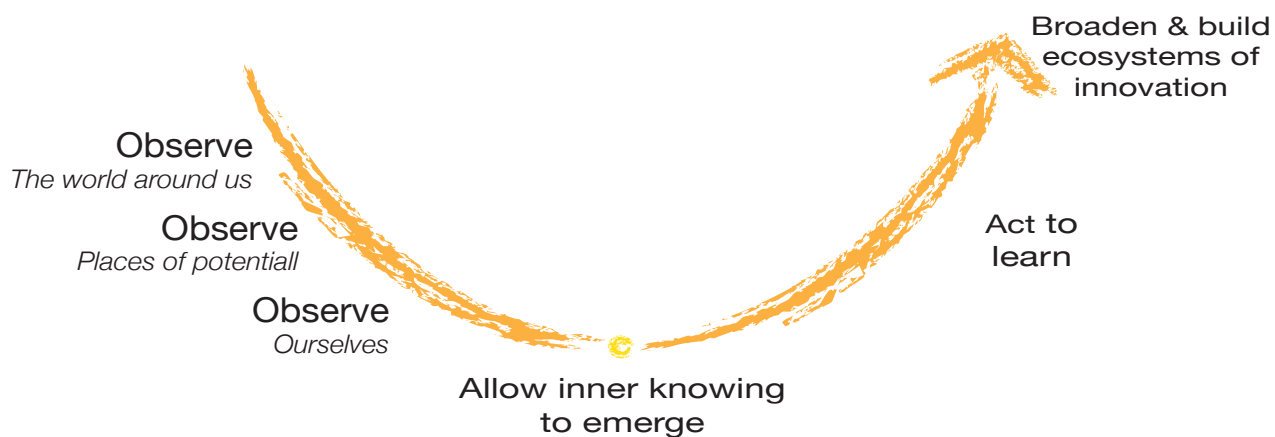
... **opportunities to connect** with other social inventors

Change teams cultivate a healthy social field by continually improving their ability to follow two patterns that guide transformation. 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 change team's overall approach to developing the social inventions that make it possible for people who require long term support to compose lives that they and the people who love them have good reasons to value.

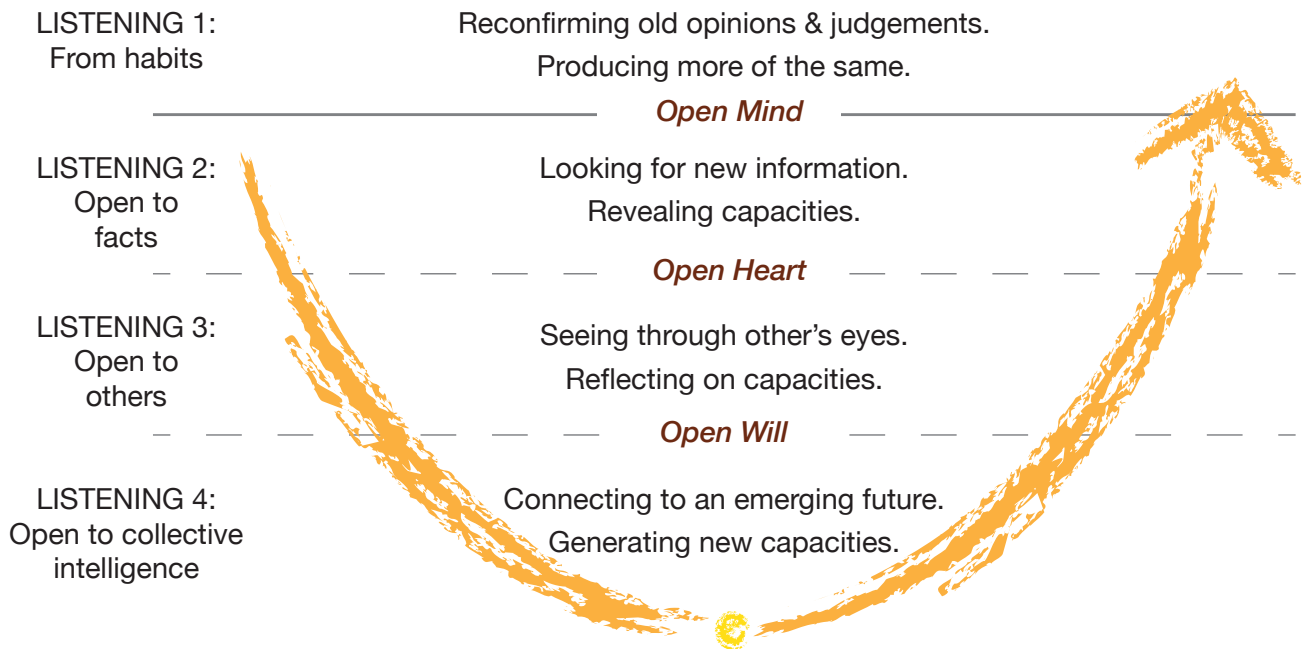
The change team intentionally steps outside the routines and relationships that successfully reproduce more of the same. They avoid the trap of jumping to solutions and make time to observe more of what is present in their organization, in their discipline and in their community. They take time to make 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 they have discovered and what they have learned about how those seeds can grow.



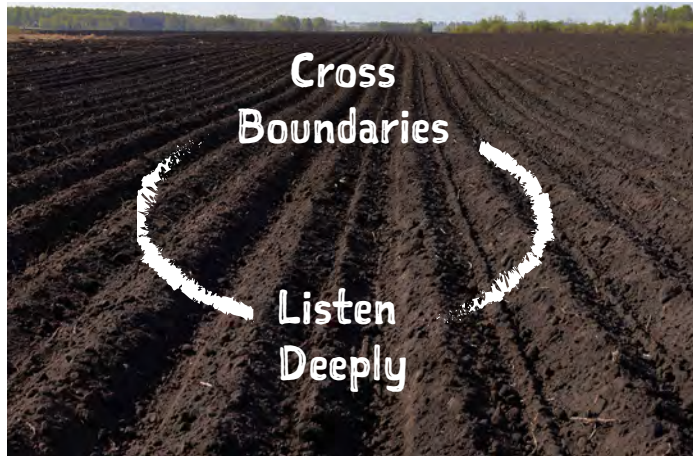
* These patterns for transformation recur at each level of organizational learning. A change team can be a person and their circle of support, a team responsible for developing organizational capacity for individualized support, or a team responsible for redesigning a system to offer people and their allies greater responsibility for directing the support they require.

What is our highest purpose?

The second pattern increases the change 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=eLfXpRkVZaI



A healthy social field develops as change team members intentionally cross the boundaries that separate people who require long-term support 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 hidden behind rules and role definitions and free to operate out of sight, without questioning. These exclusionary boundaries indicate where something needs to die and something new needs to be born.

Deep listening brings change team members across boundaries as they purposely step outside the places and roles that 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. What we hear and see passes through filters that reject new possibilities as “wrong”, “unrealistic”, “inappropriate”, 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 just sets up 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 threatens 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 into 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 openness to the new: 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 page 19 to reflect on the level of listening you achieve in an interview or a change team meeting.

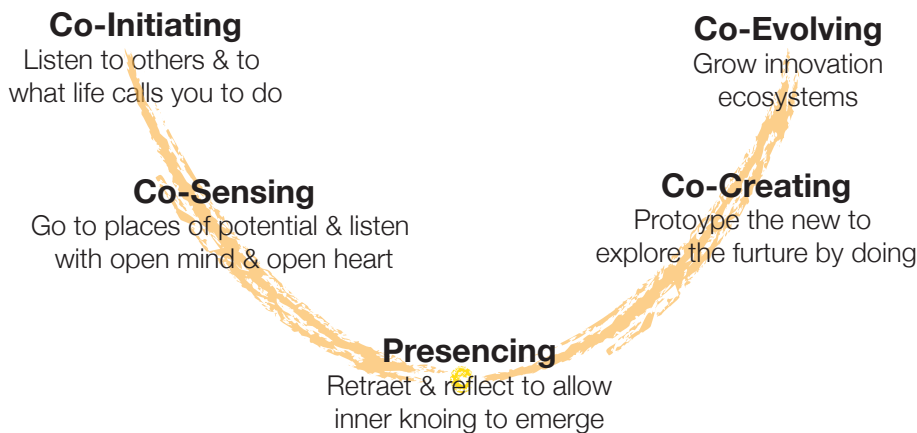


Investing time and attention in listening deeply to a diverse network of people in a variety of settings makes two contributions to the change process

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



Grow the change team by listening for desire to create the new

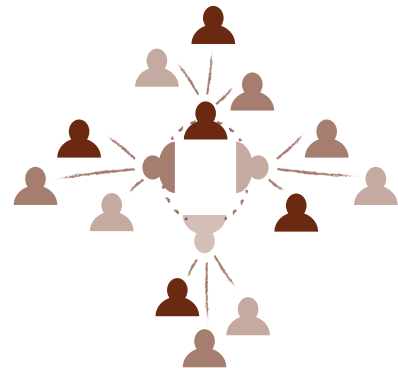


Co-initiate with a small team of interested people.

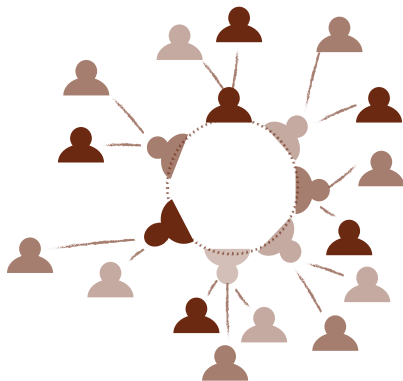


Listen deeply to people with diverse experiences of and ideas about...

- ... current reality
- ... desirable futures for themselves, and their community
- ... the contributions the organization can make to moving into those futures.



Add members to the change team as you identify people with the desire to bring the new into being.



Use the practices on the following pages to build a social field in which the network of people committed to innovation will grow.



If you are going to work with me
you have to listen to me.

And you can't just listen with your ears
because it will go to your head too fast.

If you listen slow,
with your whole body,
some of what I say
will enter your heart.

–Christine Meyer

Dialogue Walk

Walk side-by-side with a partner. Divide the available time in half so that partners have equal time to practice listening. Silences are as worthy of holding attention as speech is. Each takes about 15 minutes answering these three questions.



- Share two or three experiences that have brought you to where you are in your work. (Start with an experience in childhood or adolescence if you can recall one.)
- Talk about one or two “guardian angels” —your helpers and mentors on your work journey so far. What have you taken from each of them?
- Where do you feel the future in your work right now?

Take two minutes at the end of the walk to journal:

What do you want to remember from your dialogue walk?

To hold space means that we are willing to walk alongside another person in whatever journey they’re on without judging them, making them feel inadequate, trying to fix them, or trying to impact the outcome. When we hold space for other people, we open our hearts and let go of judgment and control.

–Heather Plett

Reflecting on our Level of Listening

Pause and reflect for a minute after a meeting or conversation to identify moments of Level 3 or 4 listening and any ways the voices of judgment, cynicism or fear showed up.

Level of Listening	Experience	Result
Listening 1 <i>downloading</i>	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 <i>debating</i>	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 <i>dialogue</i>	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 <i>collective creativity</i>	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.
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.		

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.



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 begin to see their situation through their eyes.
- Figure out a few open ended questions to initiate 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 so the person giving the interview has space 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 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.

Steps

- 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 understanding the work of strengthening person-centered practice.
- Take 30 minutes for the interview.
- Choose or 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.
- Take a moment of stillness before the interview to center yourselves on the dialogue.
- Enjoy the conversation, even when some of it may be challenging or difficult to hear.
- Each take 2 minutes to journal. Record ideas and insights you want to remember.
- Trade roles: the listener gives an interview.

Possible Questions

- What moved you to set out (to take this job, join this particular organization, follow this path)? What were you seeking to accomplish?
- Thinking about the situation of people who require supports...
... what gives you hope
... what gives you concern
- 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 leadership for meaningful change?
- 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 now?

What I want to be part of creating

My personal resources for creation: gifts & capacities of head, heart & hand. Knowledge, skills, imagination inspired by experience, relationships.



What my role offers to what I want to create: Authority to convene & consult; legitimate opportunities for influence; access to information, knowledge & advice; power to decide; supports to my learning & development...

The responsibilities that go with my role

Mapping our system





The Table* describes in detail four different models for organizing long term supports that have emerged over the past 60 years. Each model is coherent when read and applied up and down the columns but current reality is a mix of models and parts of models. Some operating parts of established organizations may retain elements of institutional care while other parts offer integrative supports. Policy commitments to Integrative supports may compete with a rules based, command and control approach to implementing change.

Evolving Systems Models	Institutional Care	Managed Care	Integrative Supports	Community Supports
Organizing principle	System centered based on targeted population	Coordinated Services & Outcome Centered based on targeted population	Person-Centered based on unique qualities of each individual	Citizen/community centered. Based on individual rights and for betterment of community
Individual-professional relationship	Expert-patient. Professional directed & power over.	Provider-consumer. Professional responds to consumer need & power-over	Facilitator/Broker- self directed individual. Individual designs with others & power shared	Resource-autonomous citizen. Community supporting with professional auxiliary & power collective
Individual service experience	Functionally specific, pre-set services & programs based on assessed deficiencies. Push model driven.	Habilitation pathways or treatment protocols determined by clinical assessment. Coordinated care, pull driven.	Individualized supports, circles of support, peer support, wrap around services. Person driven supports negotiated.	Self or co-directed. Home & community located. Community driven (allocation)
Focus of innovation & how we make something new	Administrative & functional effectiveness & efficiencies (internal to the system). Focus on maintaining status quo. Scaling out-replication, dissemination. Increasing numbers.	Refocus to outcome driven , coordinating care. Delivering customized services in cost efficient ways. Scaling up. Changing laws, policies, rules.	Creating personalized life experiences outside program walls. Scaling deep: redesigning roles & relationships. ; forming allies; connecting to community	Social innovations: support individual autonomy while promoting inclusive, healthy communities. Scaling deeper: changing relationships, cultural values & beliefs.
Degree & type of complexity & how we make meaning	Many programs & regulatory details to manage. Sense is made when diagnosis matches services or treatment modality.	Many clinical disciplines & financial arrangements to integrate & understand. Sense is made when care is managed efficiently & is well coordinated.	Social interaction, relational/emotional maturity. Key stakeholders from different cultures, worldviews & interests. Sense is made through deep listening, dialogic practice & collaboration.	Unclear, unpredictable futures with sense making, understanding & solutions emerging from action-reflection cycles.

* Adapted from Hanns Meissner, Creating Blue Space, See Chapter 4.

Organizational culture, coordination mechanism. How power shows up.	Bureaucratic or paternalistic culture. Hierarchy, command & control.	Rules based, clinically dominated culture. Managed care entities & care management.	Affiliation, appreciation based culture. Network, facilitated dialog & mutual adaptation: person-centered planning.	Inclusive, diverse culture. Seeing from the whole through a process of collective sense making & innovation cycles.
Source of legitimizing service or supports activity	Government policies & regulation. Social legislation.	Corporate driven. Rules & norms to make the market work.	Appreciative inquiry driven. Individual values. Infrastructure for learning & innovation.	Collective intelligence driven. Infrastructures for seeing in the context of the whole.
Outcomes for individuals	Placement. Personal care, face to face service Activity & supervised housing.	Appropriate service levels. Reduced service costs. Consumer satisfaction.	Individualized supports leading to own home, relationships & meaningful activity.	Citizenship: full inclusion & participation in typical community settings. Lives of distinction. Assumption of valued roles.
Leadership orientation	Authoritarian/bureaucrat	Technician/problem solver	Social change master	Generative leader
Perceived readiness of working age adults for valued social roles, employment.	Not ready	Assessed readiness	Employment first.	Employment for all.

- Scan the Table to get an overall sense of the four models.
- Work with 2-3 others.

				
How we see people with disabilities	Logic & vulnerable	Worriers with clinical needs	As individuals with disabilities	As citizens
Our design response	Individual cases	Individual cases	Offer person-centered supports	Mobilize community resources
Outcomes	Personal care, activity, housing	Plan of coordinated care with appropriate service level Consumer satisfaction	Individualized supports leading to job, home & relationships	Valued roles A life of distinction

- ... Take 5 minutes alone and use post-its to identify specific practices and structures that reflect each of the four models from the perspective of your role. Use square post-its to identify structures and practices in the red and brown spaces. Pay particular attention to structure and practices in the blue and green columns. Use post-it stars to identify these leading edge practices.
- ... Each take a turn to tell a story of current reality. Stick the post-its on the poster to illustrate the story as you tell it.
- ... Ask each other clarifying questions, especially about the seeds of the future posted in the blue and green columns.
- Look at the whole map
- Conclude with two minutes of journaling to identify what you want to take away from your mapping.

Naming the positive core



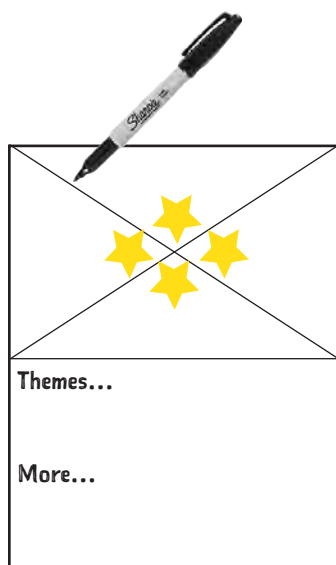
A star generates energy and creates elements that form the building blocks of life.

Work in a group of four.

- To begin, each person selects one of their stars from the blue or green spaces on chart on page 25 and takes 2 minutes to make notes in answer to this question:

What is the positive core of this star: the essential features and factors that give it life, energize it and make it work?

- Make a poster like the one on the left.
- Each person tells the story of their star's positive core. The person to their right records key points in one of the quadrants of the top half of the poster.
- The group identifies and records common themes in the positive core stories.
- The group identifies and records what they want to create more of.
- Journal for two minutes



Reflections on Mapping our system & Identifying the positive core

Exploring challenges: Coaching Clinic

1 hour plus instructions

A **Coaching Clinic** is a team of **3 to 5 equals** who meet to discover fresh ways to understand and innovative ways to meet leadership challenges. This exploration provides the whole team with the opportunity to understand their work better. Trust grows as members continue to offer mutual support over multiple meetings.



*See a challenge
with fresh eyes*

Be mindful

- The purpose is to listen deeply, attending to, sharing and building on the images, metaphors, feelings and gestures that the challenge story evokes. Suspend the desire to download quick fixes, pet theories or sympathy. Access curiosity, compassion and openness to what wants to emerge from the process.
- Closely follow the steps and allocated times. They guide the circle through the U: a period of listening; a moment of stillness and reflection; a period of enrichment of the challenge story with the emergence of new perspectives and new possibilities for action. Stillness is essential, take the full three minutes.
- Create a distraction free circle that allows **an hour of focused attention**. Writing and drawing materials help capture or sketch insights and images.
- It's easy to get bogged down in *might-be-nice-to-know* details of the situation. The process works best when the circle attends to and builds from what is presented as the essence of the challenge.



Roles

One circle member presents a specific challenge that they are currently facing, a challenge in which they play a key role. The challenge can be outlined in 15 minutes and the presenter wants new perspectives.

The other circle members serve as **coaches**, listening deeply, attending to and sharing what presentation of the challenge evokes.

One coach takes responsibility for managing the time and reading the instructions to the circle at each step. Another coach takes notes of key points, a third graphically records images that arise throughout the clinic.

Based on Case Clinic. Instructions at <https://www.presencing.com/tools/case-clinic>

Watch a guide to Coaching Circles at <https://www.youtube.com/watch?v=AwjKROGi6H4>

Steps

1	2 min	Select challenge presenter, timekeeper, note taker, & image recorder
2	15 min	Intention statement by challenge presenter Take a moment to reflect on your sense of calling. Then present your challenge, answering these questions: <ul style="list-style-type: none"> • Current situation: What key challenge or question are you up against? • Stakeholders. How might others view this situation? • Intention: What future do you want to create? • Threshold. What do you need to let go of and what do you need to learn? • Help: Where do you want help or new ideas? Coaches listen deeply. They may ask clarifying questions but not give advice or make observations.
3	3 min	Stillness <ul style="list-style-type: none"> • Listen to your heart. Connect to what you have heard with your heart. • Listen to what resonates. What images, metaphors, feelings or gestures* come up for you and capture the core of all that you have sensed in the presentation of the challenge?
4	10 min	Mirroring and embodying <ul style="list-style-type: none"> • Each coach shares the images, metaphors, feelings and gestures that came up in the stillness or while listening to the presentation of the challenge. (What's shared need not be complete or even make sense to the person sharing.)
5	20 min	Generative dialogue <ul style="list-style-type: none"> • The challenge presenter reflects aloud: <i>Hearing these responses, what touched me? What resonated with me? What questions and reflections come up for me now?</i> • All reflect on the mirroring and embodiment and the challenge presenter's reflections. Move into a flow of dialogue that surfaces new perspectives on and new possibilities for the challenge. Stay in service of the challenge and the presenter's journey without pressure to fix or resolve the challenge.
6	8 min	Closing remarks <ul style="list-style-type: none"> • By coaches • By the challenge presenter: <i>How do I now see my situation and the way forward?</i> • Thanks and appreciations, finishing with the challenge presenter.
7	2 min	Individual journaling to capture key insights and learning

*Gestures are body positions, movements and facial expressions that arise in response to what we sense. Sharing gestures without explanation or commentary is a powerful form of mirroring.

3D Sculpting: Sensing from the Four Directions

About 35 minutes for each person, plus instructions



*Sense the whole
that calls you to
leadership*

A **3D Sculpture** invites exploration of a change a person wants to be a part of bringing to life. It involves three steps:

1. Creation of **Sculpture I** which reflects the current reality of the situation that wants to change.
2. Reflection on Sculpture I from the Four Directions.
3. Creation of **Sculpture II** that represents the next stage in the development of the change the person wants to create.

First Round

- Person one creates **Sculpture I**, person two practices holding space for them.
- Person two guides Person one's reflections using the **Four Directions Questions**.
- Person one creates **Sculpture II**.
- Each Journal for 2 minutes.

Second Round (reverse roles)

- Person two creates **Sculpture I**, person one practices holding space.
- Person one guides Person two's reflections using the **Four Directions Questions**.
- Person Two creates **Sculpture II**.
- Each Journal for 2 minutes.

Be mindful

- Your whole body knows the situation. Don't plan your sculpture, let your hands show your thinking mind what your whole self knows.
- Trust your intuition in selecting materials and shaping the sculpture.
- When you are the Guide support the person sculpting with quiet and focused attention. Practice holding space for their exploration. When Sculpture I is finished offer the reflection questions with an attitude of receptiveness to whatever emerges.

Steps

Sculpture I

- Form a sculpture that represents the situation you want to change and the social context that surrounds it. Set a timer for 12 minutes.
- Take a picture of Sculpture 1.

Reflection

- Reflect on your sculpture from the four directions. Move to look at the sculpture from each direction and answer the questions on the next page as your guide asks them. Set a timer for 12 minutes.

Sculpture II

- In 3 minutes change the sculpture to better represent the future you want to create.
- With your guide, note the differences between Sculpture I and Sculpture II. Identify potential leverage points: What changed first?
- Take a picture of Sculpture 2.
- Answer:
... **What would I need to do next to give life to this emerging future?**
- Each journal for 2 minutes.

Questions from the Four Directions

GUIDE: When you look at this sculpture...

...East: Feeling and relationship

- ... what do you love; what ignites your best energies?
- ... what other emotions come up? If each emotion could talk, what would it say?
- ... what are the essential relationships –connections or separations– between the parts of this whole situation? How do these feel?

...South: Truth and action

- ... what key conflicts and hard truths do you face going forward?
- ... where does power lie?

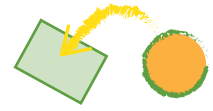
...West: Perspective

- ... what are the bottlenecks that prevent the current situation from evolving?

...North: Purpose

- ... what is ending in this situation? What needs to die?
- ... what is seeking to emerge? What wants to be born?
- ... what deeper potential –what call of the future– do you want to bring into reality here?

Journaling: What is my Work?



Center yourself: breath deeply. Quiet your mind.

Listen to yourself. Write freely, without a plan. Let your pen show you your current sense of the possibilities you are discovering.

- Look at yourself from your friends' point of view. What would they say are the gifts and capabilities in you that they appreciate most?
- What are your most vital sources of energy? What do you love?
- Imagine you could fast forward to your last day of work with people who rely on long terms support. Looking back on your whole journey with long term support, what legacy are you glad to have left? What do you want to be remembered for by those who continue the journey?
- Thinking about your work over the past two days, what core questions have come alive for you?
- Thinking about your work over the past two days, what new or renewed possibilities have you noticed? What wants to be born with your help? What future seems most worth working to create?
- What would you have to let go of in order to step into this future?
- In your current situation, what provides the seeds for the future you want to create? What is already there that you can build on, encourage and nourish with your attention and energy?

Looking ahead

The purpose is to sketch your sense of what comes next. Focus on action that will allow you to discover openings to strengthen the impact of person-centered planning. Don't expect to complete a big change in the coming four months.

1. Make a current statement in words and images of what you want to be part of creating to increase the impact of person-centered practices.
2. Write three statements that complete the sentence, "This work is important to me because..."
3. Identify current questions and uncertainties that come up as you think about what you want to create.
4. Identify places of potential: people to talk to, places to visit, places to spend time observing and inquiring, things to make time to read or watch.
5. Identify the person with whom you will have your next conversation about what you want to be part of creating.
6. Potential distractions...
 - ... a. what the *Voice of Judgment* says.
 - ... b. what the *Voice of Cynicism* says.
 - ... c. what the *Voice of Fear* says.

Then

Chose at least one Theory U practice you want to apply. Each one is powered by listening and courageous action; each is a different way to arrange opportunities to listen and act. (Page 36)

Make a reminder –a card or a poster that you can use to keep your action alive. An image. A few words. Energize your reminder with color.

Renew (or set up) your Coaching Circle and arrange your next meeting. (page 36)

Places of potential to learn from

4

First conversation back home with...

5

Voice of Judgment says:

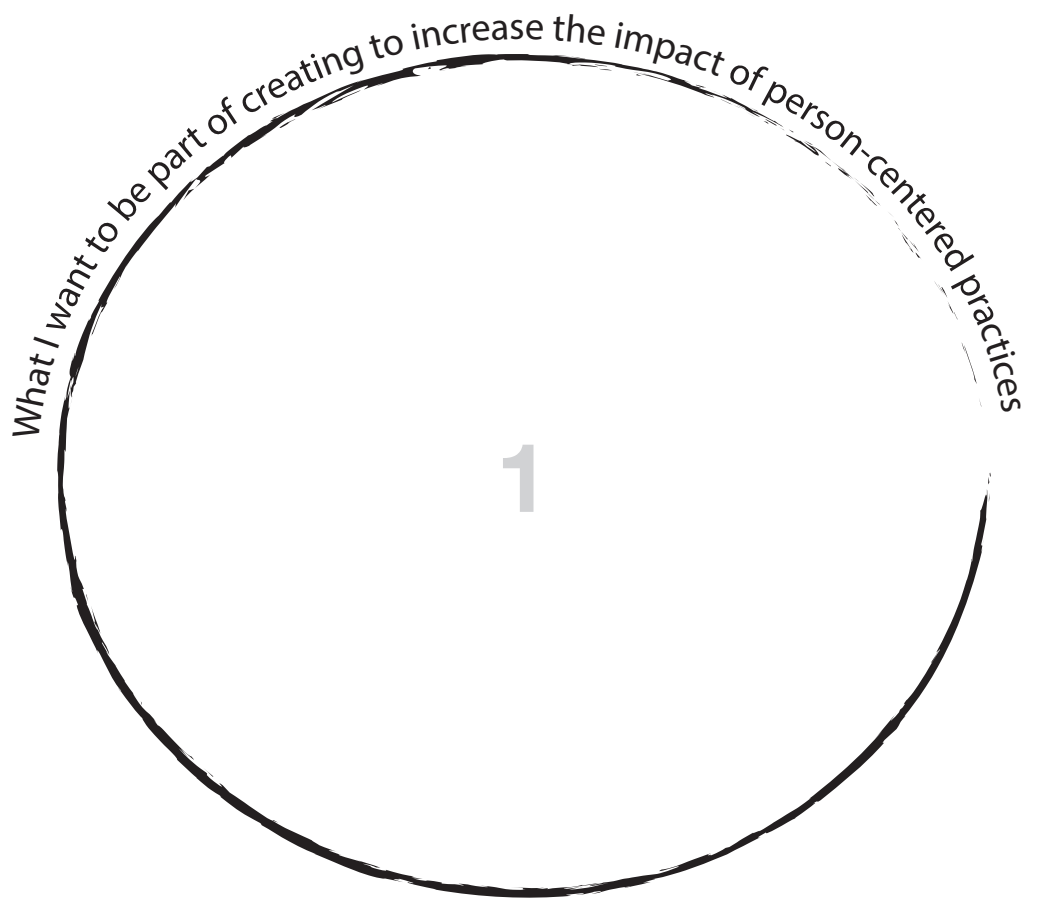
6a

Voice of Cynicism says:

6b

Voice of Fear says:

6c



This is important to me because...

2

Current questions and uncertainties

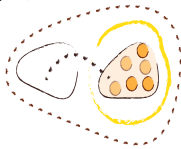
3

Create blue space in your routine

Schedule time to try these practices. Your knowledge will grow and opportunities for action on what you want to be part of creating might come up. Check the practice you want to try first and put a date on your calendar by which you will try the practice.

3 hours to 2 days

A Learning Journey is an opportunity to widen the horizon of possibility by visiting places outside the change team's usual experience where people are finding new paths to individualized supports for rich lives in community. It gives change 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.



Page 44

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



Page 40

1 to 2 Hours

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



Page 42

Coaching Clinic guides a circle of 3-5 people through the U the in a structured hour and fifteen minute process: a period of listening; a moment of stillness and reflection; a period of enrichment of the challenge story with the emergence of new perspectives and new possibilities for action.



Page 28

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.



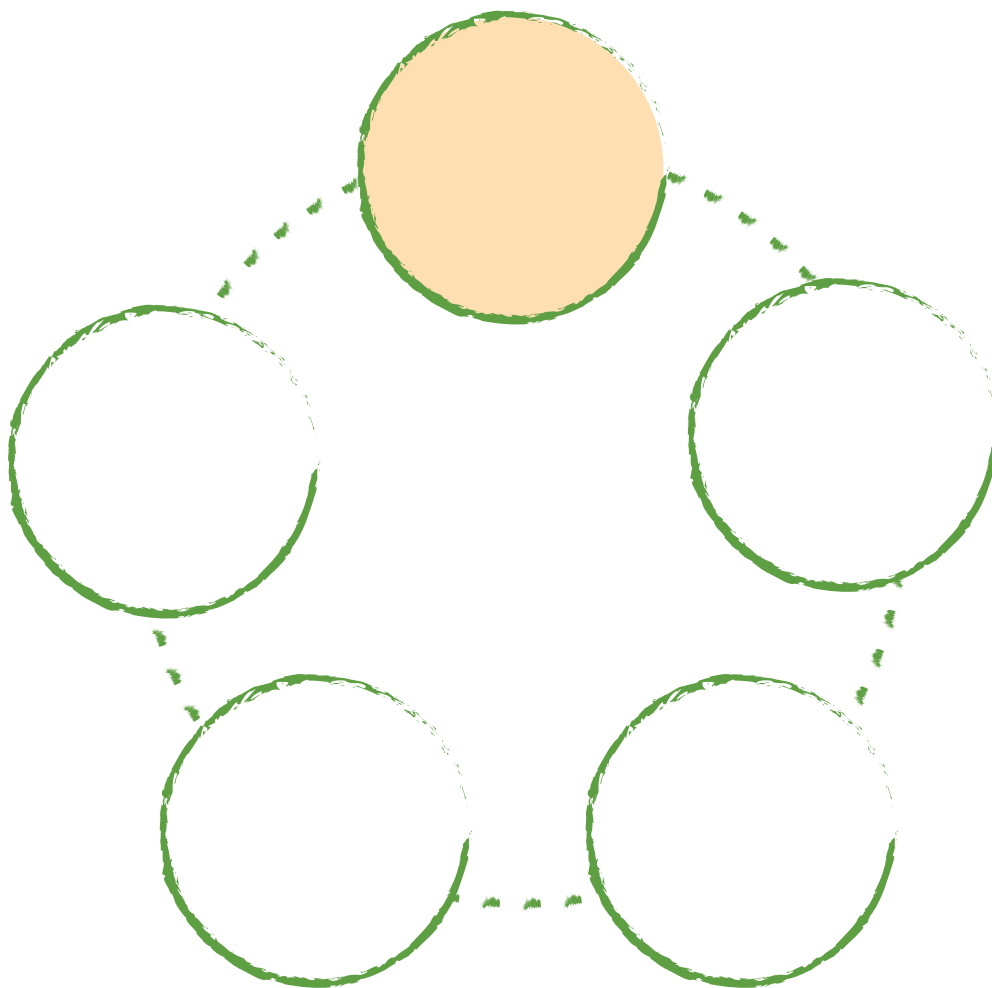
Page 38

Coaching Circle

A Coaching Circle offers its members support as they encounter and meet leadership challenges. Members commit to connect for 75 minutes or so every few weeks. They may choose to structure their calls as a Coaching Clinic (page 28), dedicating their meeting to supporting one member's exploration of a leadership challenge.

Use the diagram to record the names and contact details for the three or four people you choose to be your Coaching Circle. To make the most of the whole group, join with people from different organizations or departments and different roles.

Appoint a wrangler. Someone who will stay in contact and make sure the first meeting happens.



Plan for an every month or six weeks. It's best if you can agree on a regular time (First Wednesday of the month from 8:00 to 9:30 AM.) Decide how you will meet (Conference Call, Skype, Zoom, in person, etc).

Will meet on _____ at _____ by _____

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 interviews

- People a track of social invention and leadership in their own lives, in their community, and in the organization.
- People who hold history: organizational founders & past leaders; organizational elders (especially people who rely on long term-support & their allies); 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.



inviting with...

with record invention



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 initiate 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 so the person giving the interview has space 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 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 change 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 change 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 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. Journal the key ideas and insights you want to remember.
- 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?

Sharing place and time

Sharing place and time allows change team members to absorb knowledge by immersing themselves in a different environment. The change 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 who rely on long-term support who have benefited from individualized supports and live in their own homes, hold real jobs, are engaged in learning or are civically active.
- People in group settings: group homes, day programs, community experience programs.
- People in more restrictive settings: nursing homes, institutions.
- Families who provide substantial assistance to people who qualify for long-term support.
- Direct support workers in group and individualized services.

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 as quietly as you can. Experience 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 experiencing 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 communication we don't understand in a group home; a mother who lives with and provides assistance to a person whose behavior can be challenging; a 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 change 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 focus 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 quietly 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.
- 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 make you uncomfortable. Consider using the Reflection page that follow this one 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

Stakeholder Interview

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

Consider inviting interviews with...

- People who rely on long-term supports.
- Family members.
- Allies.
- 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 long-term support system.



*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 initiate 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 uncomfortable statements. You can also get pulled back 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 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.

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

Steps

- Make a list of people whose perceptions of your organization will help the work of transformation. 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 change 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 person's 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 clarify 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 difficult or challenging to hear.
- Schedule time immediately after the interview to reflect on the interview. Consider using the Reflection pages that follow this one.
- Send the person a thank-you note the next day.

Possible Questions

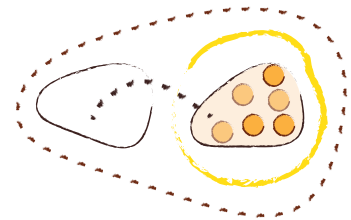
- When our organization is at its best, what does it do for you? What happen for you when our organization provides just exactly what you need, no less, no more?
- How could our organization fail you or let you down? What does or could happen when our support breaks down?
- When you think about the future what would you like to be different for you? How could our organization help with that?
- What worries you or makes you afraid? What do we do that helps? What more could we do?
- 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?

Learning Journey

A Learning Journey is an opportunity to widen the horizon of possibility by visiting places outside the change team's usual experience where people are finding new paths to individualized supports for rich lives in community. It gives change 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 that 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 Judgment and the Voice of Cynicism and access your sense of curiosity, appreciation and wonder.
- A Learning Journey expands the social field by connecting your change 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 as you experience the work of a different organization.
 - ...listening to the emerging whole: tuning in to what the wider social field is showing you about your highest purpose and how to move deeper into it.
- Take what you hear and 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 and 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 change 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 change 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 change 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 meet a variety of people and experience and learn from as much of the organization's work 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 that follow this one.
- Bring what you have learned back to the whole

change team.

Possible questions

- What has 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 two things about the system that would better support transformation, what would you change and why?