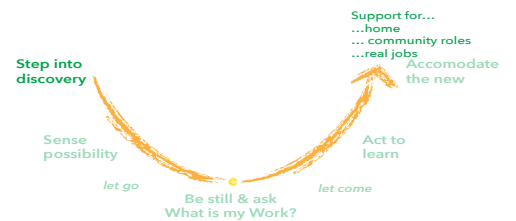


DISCOVERING What more is possible

Leadership in Person-Centered Planning

Session 1: Step into discovery



NEW YORK
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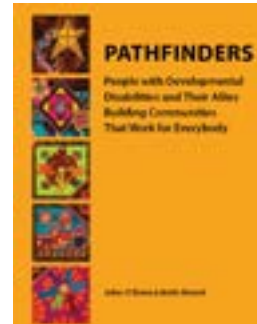
Institute Faculty: Beth Mount, Hanns Meissner, Christopher Liuzzo & John O'Brien, who wrote the Field Book on behalf of the whole Faculty.

The understanding of Person-Centered Planning, The Community Rule & ideas about the form supports should take in this Field Book are only the opinion & beliefs of the Institute Faculty.

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



Creating Blue Space: Fostering Innovative Support Practices for People with DD
www.inclusion.com



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

Find the NYDOH **Person-Centered Planning & Practice Resource Library** at www.health.ny.gov/health_care/medicaid/redesign/person-centered_planning/

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.org. A short introduction in the context of social invention with people with developmental disabilities at <https://bit.ly/37x3YZ4>



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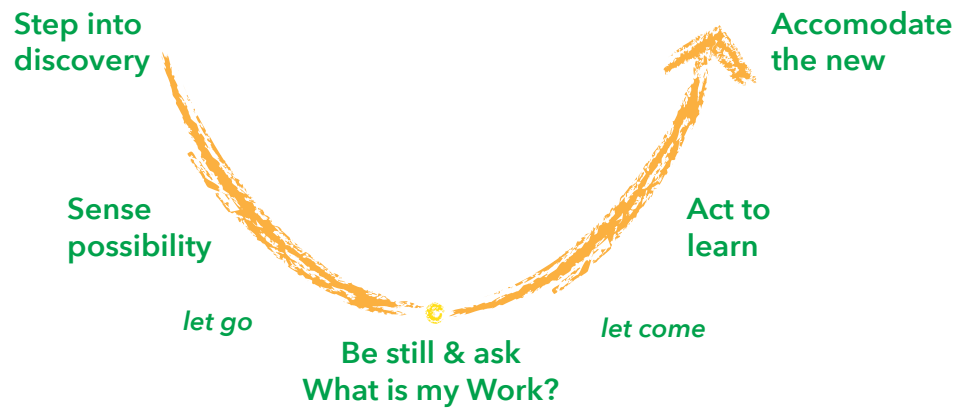
OUR GREAT QUESTION

What: **How might we build our capacity to discover what more is possible for the people we support & for our organization?**

Why: **To increase the contribution that person-centered planning makes to living a good community life.**

How: **Support one another to try practices & ways of thinking that guide discovery.**

Capacity grows by following this path of discovery for people & for the organization.



*A great question
refuses to be answered.
So it keeps leading us
into deeper connections
with each other
& into deeper thinking.*

-Judith Snow



Past participants identify some benefits of active participation in the Learning Institute

“Learning to listen in new ways was profound. It enabled us to “step out of this box” into totally different perspectives. We are reminded that **building relationships** is at the center of all the work.”

“Our management team has learned to ask *what more is possible?* We have many more words, frameworks, & strategies for sticking with that question & creating new possibilities.”

“The **distinction between technical & adaptive** action is eye opening. It gave our team a fresh way to analyze the problems we are grappling with.”

“The Learning Institute provides a new language that opens new landscapes for seeing the work. We found visual representations that strengthen new perspectives and help us address **adaptive challenges**.”

“**Levels of Listening** has impacted my own growth on many levels. We’ve shifted our entire organizational culture using the Levels of Listening frame. We see ourselves listening or not & have more power to change the conversation.”

“The sessions give us an opportunity to push the pause button, to release from the daily grind & enter into self reflection. We take those small times to remember what we are doing & why. All else shifts from there.”

“Having a broader understanding of the work by breaking away from service & medical models to get back to appreciating the personal side of the work was intensely refreshing!”

“The art related exercises were powerful for me. The way we could pull something together out of nothing re-energized us & supported us to feel less burned out. Engaging in a 10 minute act of creativity opened new ways to listen to self & others.”

“Participating in the Learning Institute was like having a new room to go into. It was not just a safe space, but a brave space. We could find what is good even in the ambiguous and messy situations we are in.”

“The Learning Institute supported families to see how much they are important eyes and ears & to recognize how much they bring to the table. When they discover their own **Blue Space**, they find new ways to make a difference.”

“Our own internal Learning Institute is now part of the organizational plan. Finally people with disabilities are having a real voice in increasing levels of decision making.”

“We use **case clinics** to explore difficult situations... Something new always arrives from the process.”

“We live with lots of pressure to solve things quickly. We discovered that **holding space** matters as much as problem solving. Listening first gives confidence that better action comes naturally.”

“The Learning Institute is helping our team see & develop a theory of change. We have a saying, ‘Remember your why; what is your purpose?’ Remembering purpose helps to reclaim **Blue Space** and find fresh perspectives..”

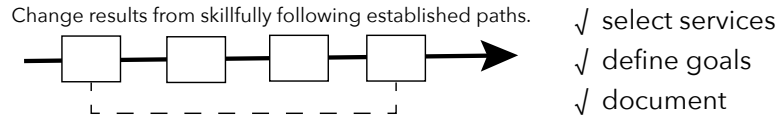
“Our executive team attended the Learning Institute together. It helped us reset our philosophy & improve the nitty-gritty of daily operations.”

“**3D Mapping** was so powerful for me that I put together kits & gave them out to teams throughout the organization. With some materials, instruction and support ,people are finding new ways to shift the way they think about the work.”

Highlighted words name practices & ideas you’ll meet in the Learning Institute.

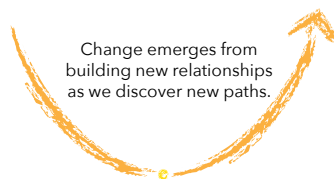
Organizations funded by HCBS can practice two forms of person-centered planning.

Person-Centered Planning^I aims to get the person the best of what an organization already knows how to do. This is the most common way that people benefit from person-centered planning.



Person-Centered Planning^{II} aims to develop new capacities in an organization & in the community. It activates & guides a search for what more is possible. The person is a co-creator of the path to discovery as the organization learns to offer new forms of support in new ways.

Because we think that *The Community Rule* calls organizations to develop new capacities, this is our focus.



A third form of person-centered planning happens when self-advocacy groups or family networks support planning outside the Medicaid Service System or Special Education.

THE CALL

How might we...

- ...offer people the option to live in their own home with the individualized support they need?
- ...support people to engage in valued roles in community life & access the same community resources as other citizens do?
- ...offer people of working age the option to do a paid job in the community?
- ...use person-centered planning to increase people's influence on the supports they need to live a good community life?

Person-centered planning¹¹ activates & guides co-creation of the supports necessary to offer a person more of these options when there are no well established pathways to follow.

In *The Community Rule* CMS reflects the achievements & aspirations of people who count on HCB Waiver funded services. The Rule calls us to keep improving our capacity to serve these purposes:

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.

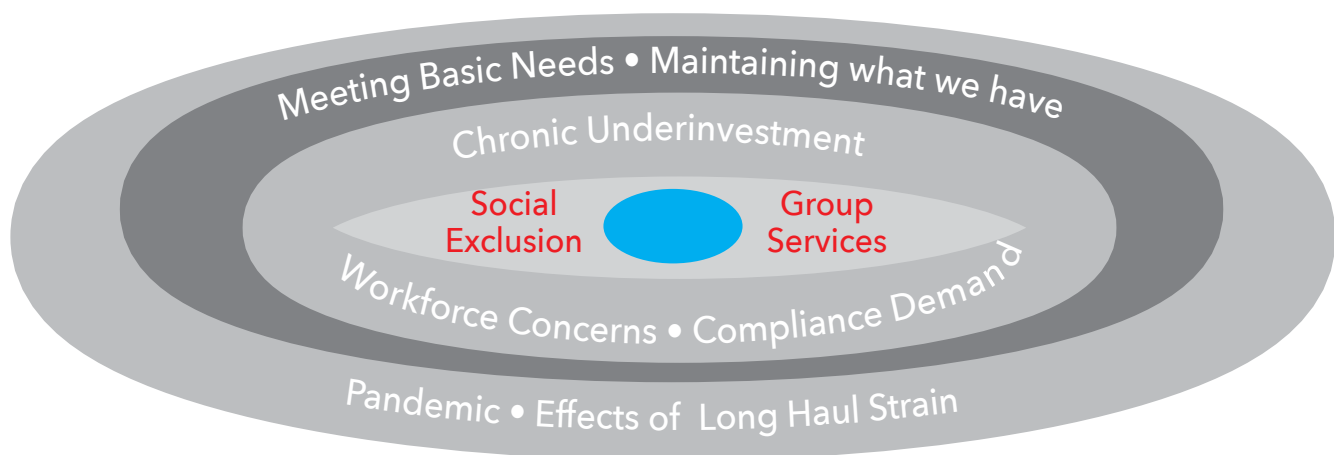
These valued roles can't be produced **for** people or delivered **to** people. They can only be co-created **with** people.

OUR WORLD

Our world challenges our ability to answer *The Call*. So much competes for our attention & energy. So much tests our Action Confidence.

Active participants in the Learning Institute support one another to identify positive & possible ways that they can increase the impact of person-centered planning.

Changes that matter co-create new ways to organize the outer work of offering person-centered support while they invite the inner development that strengthens action confidence.



Action Confidence:

belief in our ability to make a difference when uncertainty is high.

Intention is essential to avoid being overwhelmed by the external forces shaping our world. Decide to use this time to move around in the blue space.

Past participants who say they benefited from the Learning Institute used it as a time to pause, think & reflect, try new practices, explore new iframeworks for making sense and meaning, & make new connections.

LEADERSHIP

Leadership doesn't require a position of authority. Anyone practices leadership when they mobilize people to face tough challenges together by keeping what is essential, discarding what no longer serves highest purpose, & learning new ways to adapt & thrive. A challenge is tough when no recipe assures success & the power to make progress is distributed among people with different interests & different ways to understand the challenge. Real loss is possible. Questions disrupt settled roles & routines. There is pressure to avoid the challenge by denial or blaming or grabbing at a quick & easy answer.

Leadership practices include...

- ... reaching out to people with different interests & points of view, listening deeply, & speaking with compassion & courage.
- ...sticking with difficult conversations when there are disconnects & tensions between stated values & people's actual experience.
- ...noticing & letting go of pressures to avoid the work & time necessary to meet the challenge.
- ...engaging in cycles of action & reflection to discover what more is possible.

CULTIVATE THE SOCIAL FIELD

The Social Field is the structure of relationships that shape awareness & attention & so the pathway along which the discovery of what more is possible emerges.

We step into discovery by intentionally building relationships among people with different perspectives, different interests, & different capacities. These relationships bridge boundaries that have separated people from each other.

We build relationships by listening & speaking to each other with curiosity, compassion, & courage; connecting to highest purpose; and learning together by trying new ways & figuring out how to do more of what works.

Person-Centered Planning is first of all a practice of relationship. A variety of methods can frame & guide the conversation, but no method can work well unless the people involved have a sense of respect, personal connectedness, & trust.

Practices that cultivate the Social Field for discovery

- Making space to learn some of each other's stories: Dialog Walk
- Noticing facilitators of listening & distractions from listening.
- Practicing awareness of levels of listening.

Dialogue Walk



Use a timer to divide the available time in half so that partners have equal time to practice listening. Each takes about 15 minutes holding these questions for their partner and listening carefully to the answers.

- 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 “angels” –helpers and mentors on your work journey so far. What have you learned from each of them?
- Where do you feel the future in your work right now?

Honor silences, they are as worthy of holding attention as speech is.

Observe the discipline of avoiding typical conversation patterns: sharing a similar experience, commiserating, interpreting, offering advice.

Take two minutes at the end of the walk to journal: *What I want to remember from my dialogue walk?*

When you repeat this, make it a real walk outdoors if you can.

Some people find silence awkward. They feel urged to respond to what their partner has said, affirming, sharing a related experience, offers interpretation or advice.

It can help to think of letting silence be & not speaking in response as **holding space** for a person’s thoughts & reflections.

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

A person-centered planning conversation will follow a different set of questions in the same spirit.

Sometimes a dialogue walk with the person or a key person makes a good preparation for a plan facilitator.

LET GO OF DISTRACTIONS



The **Voice of Judgment** makes the mind busy sorting: realistic from unrealistic, possible from impossible, right from wrong, & on and on. Turned inward to listen only to itself, mind rejects whatever fails to confirm current patterns of thinking & practice

The practice of **curiosity opens the mind** to new thoughts & challenges to what is taken for granted.



The **Voice of Cynicism** drains feeling, meaning and energy by stacking up reasons that desired change can't happen. Common tricks include over-focusing on scarcity, belittling desire for better futures as naive, & denying the possibility of altruism & gift exchange.

The practice of **compassion opens the heart**, bringing feeling and embodied knowing alive.



The **Voice of Fear** freezes action & encourages turning away by amplifying a generalized sense of vulnerability & risk.

The practice of **courage opens the will**, allowing learning by taking steps into a desirable future & responding to what happens as a result.



The voices of judgment, cynicism, & fear can be helpful in a context of evaluation. The point is not to eliminate them but to notice when they show up & let go when they get in the way of understanding others' perspectives & discovering what more is possible.

QUESTION OLD STORIES

Old stories limit discovery of what more is possible by filling the **Voice of Judgment with false certainty about what is impossible. They hide in what *everybody knows*.**

Some old stories stick to diagnostic groups:

- People with autism have no interest in relationships.
- People who don't use words have nothing to say.

Some old stories limit possibilities.

- People have to get ready to live in their own homes by completing a curriculum of independent living skills.
- Community employers won't hire people who require accommodations.

Some old stories stick to a person.

- She is manipulative & can't be trusted.
- He doesn't want to work.,

Good listening notices old stories as only part of a person's story & inquires to find more of their story.

The search for what more is possible challenges fixation on the past by looking to the future that wants to be born with the person's help.

Some limiting stories grow from underestimating the positive effects of high expectations & the effects of well supported participation in a community setting. Others grow from an overconfidence in diagnostic labels that overlook individual differences in strengths & interests.

LISTEN WITH INTENTION

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 & quiets the Voice of Judgment</i>		
Listening 2 <i>debating</i>	I became aware of some new facts and ideas that challenged my assumptions & shifted the way I make sense of the situation.	Taking account of new realities; better informed. More aware of assumptions, new ideas & alternative ways to understand current reality.
<i>Open Heart activates compassion & 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 & 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 & possibilities that did not exist when the conversation started.	A growing sense of the highest possibility in the situation & the contribution I can make to moving toward it.
<p>The table is based on a video on levels of listening presented by Otto Scharmer in the edX course, <i>U.Lab</i> www.presencing.org/news/news/theory-u-introduction.</p>		

***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

Christine first spoke these wise words in a presentation to a conference of Behavior Specialists.

For the first 30 years of her life Christine was shifted among 24 different institutional settings, caught in cycle after cycle of violence, restriction, & abuse.

For her next 30 years she received individualized support to live in her own home & engage in a variety of valued community roles.

Until her final years of life she struggled to deal with the consequences of destructive expressions of anger & to trust in the allies who stuck with her.

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

- Identify as many positive changes as you can.
- Choose a top 3 & type them into Chat.
- Sketch or find an image on-line that captures something important from this reflection & post on Slack.

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?

- Identify as many challenges as you can.
- Choose a top 3 & type them into Chat.
- Sketch or find an image on-line that captures something important from this reflection & post on Slack.

Looking further

Time & energy are limited. Try as much or as little of what interests you here when you can make time.

Live with

Live withs are an invitation to focus for a week on a dimension of the search for what more is possible. Suggestion for this week: Listening.

- Renew your intention to focus of listening at the start of each day.
- Check-in with yourself for 30 seconds after meetings & conversations: What was the most common level of listening? What was the highest level of listening?
- Notice how to Voice of Judgment, the Voice of Cynicism, or the Voice of Fear show up.
- Take a few minutes at the end of the day to journal about what you notice.

Practice

Try bringing the **Dialogue Walk (page 11)** back to your work world or your community. Notice what helps & what gets in the way of inviting someone & finding half-an-hour for a walk with them.

Use the questions as they are or modify them.

Watch

Otto Scharmer. *Levels of Listening* (8 minutes) www.presencing.org/news/news/theory-u-introduction & scroll to Videos, 7.

Beth Mount. *Person-Centered vs System Centered*. 3 minutes. www.youtube.com/watch?v=y77y7XW8GtE&t=19s

Read

Beth Mount & John O'Brien *What more is possible?* (4 p. infographic) inclusion.com/site/wp-content/uploads/2017/12/What-more-is-possible.pdf

DISCOVERING

What more is possible

Leadership in Person-Centered Planning

Session 2: Sensing possibility



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HONOR DESIRE FOR MORE

The desire for more of an ordinary good life has activated expanding possibilities for individualized support that assist people to live in their own homes, do real jobs, play valued roles in neighborhood & community life, & self-direct their supports.

We honor the desire for more when we intentionally bring together diverse co-creators, establish & tend a healthy social field by listening with open minds, open hearts, & open wills, identify what more is possible, & learn by trying new ways to establish people in valued community roles.

Awareness Based Collective Action, a way of making change when the aim is to discover what more is possible, is guided by **Theory U**.*

This way of organizing change can bring new possibilities to life for individuals, for organizations, for systems, and for communities. It opens a fertile field for any person-centered planning facilitator who wants to discover a person's interests & gifts & develop valued community roles. It can guide organizational transformation.

*Theory U & the practice of Awareness Based Collective Action are the creation of a global network of change makers led by Otto Scharmer & a core group who establish The Presencing Institute www.presencing.org.

Desire for more can originate from...
...people & families, often with support from advocacy groups.
...organization leaders committed to social justice.
...anyone who takes responsibility for persistent failure to adequately serve a person or group of people.

INTENTION

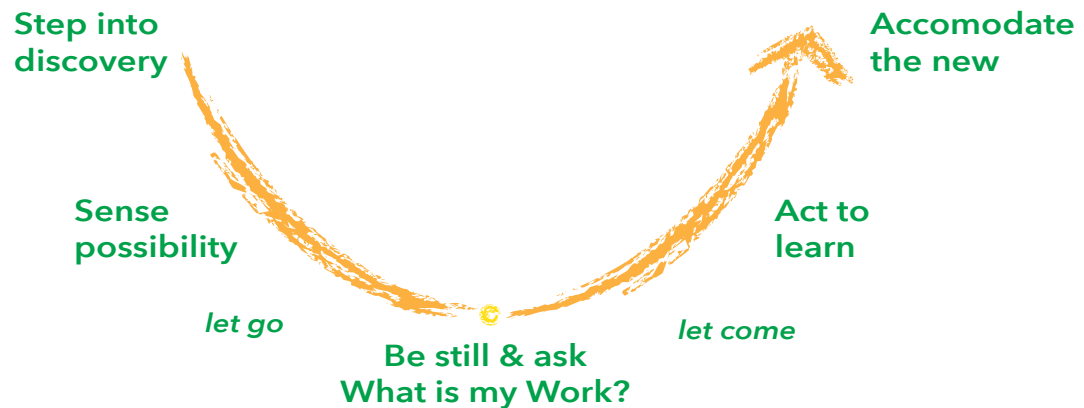
We operate in an over-committed mode, satisfying the demands of multiple inspectors, meeting daily staffing needs, working extra hours to fill in for absent staff or to earn enough to feed our families. Many items on our endless to do lists pull our attention to system requirements, rationing the time for relationships that give meaning to our work.

We are often tired & put off rest & renewal. We are impatient for quick fixes, too hurried & depleted to reflect & explore. We rely on habit & settled ideas to get by, as if we were computers downloading routines. We prize efficiency. Person-centered planning can slip into just one more item on a too full to-do list.

Most of the people we support adapt to our busyness. They make a life they have reasons to enjoy with whatever is available. They set their expectations low. When surveyed, they express satisfaction with what we offer.

The first step toward discovering what more is possible is to choose the intention to discover possibilities that will disrupt settled knowledge & challenge us to co-create new, valued experiences in community life.

DISCOVERY



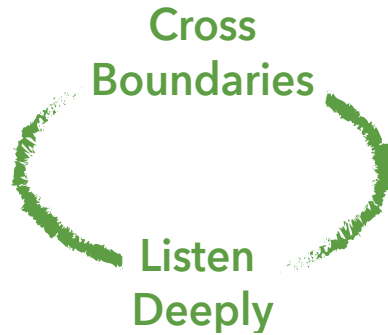
This summarizes the practice of **Awareness Based Collective Action**.

- I. Begin the journey with the choice to **step into discovery**. Form the intention to explore what more is possible in a person's life or an organization's capacities or a community's development. Claim time & space for their journey & invite a small, diverse group to join. Let go of downloading, and suspend the urge to jump to solutions.
- II. **Sense Possibility.** Connect with people & places that make new perspectives & possibilities available. Open mind & heart to different ways of knowing, different thinking, different structures, & different practices. Welcome disruption of what has become settled.
- III. Be still & discern the highest purpose the journey can serve. **What is the Work** that will generate the greatest meaning?, **What wants to be born with our help?**
- IV. To do the Work, what has to be **let go** and what image of possibility **let come**.
- V. What cycles of **action + learning** will develop our capacities to discover what more is possible. for people & for our organization.
- VI. Make **accommodations to the new** that will sustain & build on our discoveries.

This process can guide a 60 minute meeting (See Section 3: The Case Clinic) or a multi-year organizational transformation (see your copy of Hanns Meissner, *Blue Space*).

Collective action works when diverse people form a core group & commit to a journey of discovery. For a person, bring together a circle including family, friends, DSPs & community members as well as professionals interested in discovery. For organizational change, commission a cross section of the organization, people supported, family members, community members. others.

SENSE POSSIBILITY



New possibilities show up in dialogue, listening & speaking from the heart with people with different experiences & perspectives. It crosses boundaries & moves us outside the boxes that usually shape our thinking. Dialogue happens in free time, for a few quiet minutes there is no urgent problem to solve, no business to be done, no one to persuade. Difference is a gift that expands awareness of possibilities. When a perspective differs from expectations it can fire imagination or disturb. Dialogue gives practice in noticing distractions & bringing attention back to what is emerging in conversation.

This session introduces three practices to sense possibilities:

- **Learning journeys:** explore different ways of doing the work.
- **Dialogue interview:** discover hopes & concerns.
- **Mapping evolution** identify growing edges & where to withdraw.

Starting on page 26 there are instructions for several sensing practices. When you can make time we hope you will try out one or more of these practices with people back home. This is an opportunity to practice awareness of listening, increase your repertoire of ways to discover what more is possible, & sense possibilities in your own situation.

Look for a chance to cross boundaries & connect with...

... people who receive support

...families

...DSPs & front line supervisors

...organizations providing individualized supports.

...community leaders

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 & quiets the Voice of Judgment</i>		
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The table is based on a video on levels of listening presented by Otto Scharmer in the edX course, <i>U.Lab</i> www.presencing.org/news/news/theory-u-introduction .		

Learning Journey

The purpose of this conversation is to share some of what your organization is learning about person-centered support by each imagining you were hosting a Learning Journey for the others. This is not a real invitation.

If I were your host for a Learning Journey to my organization this is what I would want you to see & why. These are two or three of the people I would like you to meet & why.

Remember you are not claiming perfection, just sharing what you are learning.

Use this space to journal for a couple of minutes about what came up for you in this conversation.

Find a guide to organize a full Learning Journey on page 26

Dialogue Interview

The purpose of this conversation is to identify opportunities to make your organization even stronger in co-creating person centered supports by listening while each person takes a turn to reflect on these questions.

***We would be even stronger if...* Name one or two changes that would make your organization even stronger in person-centered support,**

Identify one big obstacle to making those changes & two or three reasons that obstacle exists.

Use this space to make a diagram that identifies & connects the desirable changes, obstacles, & reasons for the obstacle. Take a picture & post on Slack.

Find a guide to a complete Dialog Interview on page 32

Mapping the Evolving System

	Institutional Care	Managed Care	Integrative Supports	Community Supports
How we see people who use long-term support	As tragic & vulnerable or dangerous	As consumers with clinical needs	As individuals with capacities	As citizens
Our design response	Create special institutions	Coordinate care	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

The framework* tell a story of the development of human services from the time when operating a good institution was the leading edge of evolution to today's frontier in building inclusive community. The shift from care in special settings to support in community life marks the biggest shift.

Each period moved the growing edge of the field, but many aspects of what has gone before remain. What remains includes not just buildings & programs but also ways of managing. The Medicaid System calls for supports but retains many practices suited to managing care. The poor fit between structures & management suited for care and the practices that encourage the development of support can throw up obstacles to person-centered work.

* Adapted from Hanns Meissner, *Creating Blue Space*, Chapter 4. A more detailed table is on page 38

Identify two or three leadership practices move your organization into the future by encouraging the growth of person-centered Support (The green & blue half of the table).

Identify two or three management practices or requirements that pull our attention back to Care (The red & brown half of the table).

Jot a quick list of the leadership practices that energize your journey into the green & blue & what pulls you deeper into the red & brown.

Make quick sketch or find images on the Internet that captures something you notice about the tensions you notice between halves of the table.. Do

structures & practices from the Care form that compete with or undermine the development of Support?



An institution is any place in which people who have been professionally labeled are isolated, segregated or congregated.

An institution is any place in which people do not have, or are not allowed to exercise control over their lives and their day to day decisions.

An institution is not defined merely by its size.

--Inclusion Canada

Learning Journey

A Learning Journey is an opportunity to widen the horizon of possibility by visiting & learning from places of potential. It works best when a small group makes the journey together.

Consider learning journeys to explore how other organizations...

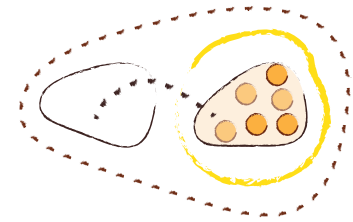
...support people living in their own homes, holding community jobs, participating alongside other citizens in community life, engaging in lifelong learning, & self-directing their supports..

...assisting people with complex or challenging needs to hold contributing community roles.

...engage in transformational change.

...develop committed direct support workers.

Move outside the world of human services & visit community & business initiatives concerned with building community.



Discover 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 your social field by connecting your work to others with a similar sense of purpose.
- Practice three forms of listening...
 - ...listen to others; allow what others offer to touch & influence you
 - ...listen to yourself; attend to what emerges within you as you experience the work of others
 - ...listen to the emerging whole: tune 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 & welcome glimpses into the best future possibility for those you meet and for the whole situation you share with them.

Based on *Sensing Journeys*.
www.presencing.org/resource/tools/sensing-journeys-desc

Steps

- Identify an organization that will provide a new sense of what is possible and different approaches to move toward those possibilities & arrange for a visit.. Based on discussion with the host, draft some questions for initial orientation.
- 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 time to renew intentions for the visit.
- Team members observe and trust their intuition to observe & inquire, asking simple, authentic questions that come up 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. Share...
 - What struck me most?
 - What touched me?
 - What surprised me?
 - Is there anything I want to follow up on?
- Bring what you have learned back home & share to identify possibilities..

Possible questions

- What has been most important in clarifying & growing commitment to individualized supports?
- What have been the most important sources of energy & 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 up or slow movement? Why do you think these challenges exist?
- If you could change just two things about our system that would better support transformation, what would you change and why?

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 & willing to follow the thinking that develops in the moment. The listener's intention is to build trust with those affected by change & 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.
- 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.

Based on *Dialogue Interview*.

www.presencing.org/resource/tools/dialogue-interview-desc

Steps

- Arrange a quiet place & allow about 30-45 minutes for the interview. Allow yourself 15 minutes or so before the interview to quiet yourself & focus your intention 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.
- Enjoy the conversation, even when some of it may be challenging or difficult to hear.
- Take 10-15 minutes after the interview to reflect & journal to capture ideas and insights you want to remember.
 - What struck me most?
 - What touched me?
 - What surprised me?
 - Is there anything I want to follow up on?
 - Where was my level of listening?

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?

Stakeholder Interview

A Stakeholder Interview is an opportunity to discover how your work looks from the point of view of people whose lives are affected by what you do & how you do it. It's a way to find out what they value about your work & what they would have you change.

Consider inviting interviews with...

- People you support.
- Family members.
- Allies.
- Legal guardians.
- Employers and landlords for people you support.
- Direct support workers and front line supervisors who are influenced by your work (don't forget administrative staff).
- Middle and senior managers.
- Board members.
- Staff from other organizations that serve the people the organization supports.
- Managers in the long-term support system.

Be mindful

- Your purpose is to learn as much as you can about how the person giving the interview experiences your work. Let go of the Voice of Judgment and open your heart so you can see your work through their eyes.
- Choose a few open ended questions to begin & 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: your performance. Notice what you want to disagree with or what makes you uncomfortable. Then let go of the explanations, justifications, & arguments that come to mind. Whatever takes you away, keep coming back to the intention to listen with curiosity, compassion (for yourself as well as the other), & courage.
- Make the most of presence & silence—quiet, appreciative openness to the person in front of you. 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 Interview*.

www.presencing.org/resource/tools/stakeholder-interview-desc

Steps

- Make a list of people whose perceptions of your work can help you improve. Don't forget people who might be easy to overlook. Notice reluctance to offer someone an interview & consider inviting them anyway.
- 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. Share your reasons for asking for an interview.
- Consider the person's convenience & arrange a comfortable, quiet place,. Set aside 30-60 minutes for the interview. Find out about any accommodations that will make it easier for the interview giver to participate.
- Frame a few open ended questions that fit what you know about the interview give. Choose a question to start the conversation. Let the other person's account of your 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.
 - What struck me most?
 - What touched me?
 - What surprised me?
 - Is there anything I want to follow up on?
 - Where was my level of listening?
- Send the person a thank-you note the next day.

Possible Questions

- When our organization is at its best, what do we do for you? What happens for you when we provides just exactly what you need, no less, no more?
- How could we 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 we help with that?
- What worries you or makes you afraid? What do we do that helps when things are hard? What more could we do?
- What criteria do you use to use to assess the value of what we provides for you?
- If we could make two changes to what we do, what changes would make the most positive difference for you?

Sharing place and time

Sharing place and time

allows design team members to absorb knowledge by immersing themselves in a different environment, observing & constructing a rich account of a setting important to a person who offers the gift of sharing their space.

Consider sharing place & 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 active in community groups.
- 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 or individualized services.

Pay particular attention to sharing time and space with people whose voices are seldom heard.

Based on *Shadowing*. www.presencing.org/resource/tools/shadowing-desc

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 discovery of what more is possible.
- 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 shape and flow of place and time more than interview to hear people's description of their experience.
- You can't know what another person is experiencing but you can do your best to put yourself in their place. As best you can, put yourself in the position of a person receiving service or a direct support worker & access your thinking, feeling & 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 hold back discovery of what more is possible. 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.

Steps

- Identify places you can learn from and decide on the role that will focus your observation: a person whose communication we don't yet 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 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 make recommendations.
- Consider the person's schedule and negotiate the times when you could learn the most. It generally works well to share...
 - ...up to 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 & evening or a weekend day where a person lives
 - ...a typical activity when a person is part of a community group, maybe more than once.
- Give yourself 15 minutes or so of quiet before joining the person to renew your intentions. Imagine the best possible outcome for yourself & those whose time & space you will share.
- Open your heart & mind. Suspend your Voice of Judgment. Try to see the setting from insider's different perspectives.
- Be respectful & quietly friendly. As appropriate to the place & activity either find an unobtrusive place to observe or join in as quietly as possible.
- If there are organized activities don't interrupt them. Converse or ask questions during breaks or other open moments.
- If the place and activity allows, make notes. Clearly distinguish description of what you see & hear from what you think & feel.
- Schedule time immediately after your observations to reflect. Think about what surprised you; what inspired you; what make you uncomfortable; what questions you have.
- Send those who make the sharing possible a thank-you note the next day.

You can observe a lot just by watching.
-Yogi Berra

Mapping the Evolving System

- Map your organizations current investments . (Rough estimates are good enough.) How many people are receiving supports (green & blue) vs receiving care? How many staff (don't forget the people who do Medicaid system required documentation and compliance related work).About how much of the organization's budget goes to Care vs Support?
- What are the biggest barriers in shifting from Care to Support? What keeps them in place?
- Look into your organizations history for stories of the very first moves into Integrative Supports & Community Supports. What are the lessons?
- Identify some of the social forces that keeps the institutional model alive.

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.

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.

DISCOVERING What more is possible

Leadership in Person-Centered Planning

Session 3: What is my Work



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Strength Together

We* believe...

- ... everyone has a desire to matter; ** gifts to develop & contribute to family, friends & community.
- ... the way a person wants to matter points to their highest purpose, their **W**ork in the world.
- ... an environment busy attending to deficiencies can disconnect people from their **W**ork.
- ... person-centered planning can offer an intentional invitation to renew a person's connection to their **W**ork & align their discovery of what more is possible with their highest purpose.

Work begins with a big **W** to distinguish a person's highest purpose—their calling, their vocation—from their small w work, the everyday activities of making a home, making a living, & making a way in the world.

"What is my **W**ork?" is not a question like, "Where do I want to go for vacation?" A meaningful answer doesn't often come easily. We can listen each other into a felt sense, often expressed in images & gestures. This felt sense can infuse simple phrases or images with extra meaning.*** Aligned with action to discover what more is possible it brings life to community.

* This page reflects the experience of the four facilitators of this Learning Institute. We acknowledge many ways of understanding and doing person-centered planning that are different from ours.

** For a review of evidence see

*** Some approaches to person-centered planning make room for this by supporting people to make pictures and artifacts to remind them of their **W**ork. For example, John O'Brien, Jack Pearpoint, & Lynda Kahn (2013), *The PATH & MAPS Handbook: Person-Centered Ways to Build Community*. inclusion.com

A story of deep satisfaction

The invitation

Thinking about your whole time with people receiving long-term support, whether in a paid or unpaid role, remember a moment of deep satisfaction. It can be something that happens regularly or a rare experience. It can be a simple, ordinary experience or an exceptional one. All that matters is that you remember it as a time you felt, "This is why I do this work."

In 3 minutes tell a story of that moment of deep satisfaction in as much specific detail as time allows. Take the whole time; silence can be an important part of the story.

What did this moment give you?

What did you contribute to this happening?

Steps

- Divide the time equally and set a timer for the first story & reflection.
- Listeners intentionally hold the invitation to tell a short story of deep satisfaction.
- Storyteller speaks for 3 minutes, waiting quietly for the next words if silence comes.
- Listeners each make a graphic record.
- Listeners reflect what the story might say about the storytellers **Work**.
- The role of storyteller passes to the next person.



Use this space for graphic recording & journaling

Journaling: What I want to create

Center yourself: breath deeply. Quiet your mind. Adopt a posture of wakefulness & dignity.

Listen to yourself. Write freely, without a plan. Let your pen show a current sense of what you want to create.

- 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 during the Learning Institute, what core questions have come alive for you?
- Thinking about your work during the Learning Institute, 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?

Take a moment of stillness to feel the resonance of what you have journaled. Be aware of any image that emerges in the stillness; an image may seem weird or unrelated and may not have found words that express its message. Honor the image by sketching it. or finding an image on line that holds it.

Building action confidence

Action confidence, belief in our ability to make a difference, is essential to doing our **W**ork.. Coping with scarcities & competing demands month after month can disconnect us from confident answers to these questions:

What power to I have to bring into co-creation?

Where are there openings for my power to make a difference?

The template of the next to pages invites each of you do a quick scan of the power you can draw on to join others in discovering what more is possible. It provides spaces to look at two sources of power to make a difference: your gifts of head, heart, hand, history, & identity and the access & influence that goes with organizational roles & positions.

Authority to assume power-over others depends on position in a hierarchy. Ability to exercise power-with others does not. DSPs, for example, have limited authority but great power to influence what the people they support experience & believe is possible.

Steps

- Divide the time equally & set a timer.
- Take a turn letting quick answers come in each of the three spaces on the template. Don't overthink, access your intuition.
- If it is not too distracting it can help to add notes to the form as or right after you speak.
- Notice & let go of the Voice of Cynicism if it shows up to discourage by claiming you are a powerless victim, unable to act.
- Notice & let go of the Voice of Judgment if it shows up to silence your claim on your gifts & assets.
- Listeners encourage, asking, "What more goes in this space?" If the speaker gets stuck.
- Journal about what came up for you in this practice.

What I can bring to co-creation: gifts & capacities of head, heart, hand, history, & identity. Knowledge, skills, relationships, cultural resources. Lessons from experience. Spiritual resources.



Powers that come with my role: Decisions I make or influence; people I supervise & train; people I can bring together to work on a project; policy, plans & budgets I have a say in: things I monitor & inspect; information I have access to; people who respect my ideas; etc.

Mu assigned responsibilities

Make an artifact

QUOTATION	COLLAGE	(picture of)
POSTER		PLAY-DOH
		SCULPTURE
ar·ti·fact 'ärdəfakt noun		
an object made by a human being, typically an item of cultural or historical interest.		
(sketch for)		MUSIC OR
(picture of)	QUILT	LYRIC
LEGO	SQUARE	SELECTION
ASSEMBLY	SYMBOLIC	
	IMAGE OR	
	OBJECT	YOUR CHOICE

Take a few minutes as soon as you can to create an artifact that will remind you of your current answer to the question, "What is my **Work**?" What matters most is what emerges for you as you let your memories of what came up mix in the process of making. You can make a sketch that captures your answer or gather materials and assemble your response.

Notice the Voice of Judgment trying to distract you with messages like "I'm not creative." Set them aside. If it feels right to you it's good.

This practice can be helpful in getting started.

- Ask yourself,, "What is meaningful to me in doing person-centered work?" Write a brief answer.
- Focus on what you have just written and ask yourself, "Why is this (the answer you gave) important to me?" Write a brief answer.
- Repeat until you can feel a sense that you have reached a final (for now) answer.
- Let an image emerge from this deepest answer, honor the image even if seems strange or irrelevant at first.

Going farther

Everyone has a desire to matter (from different perspectives)

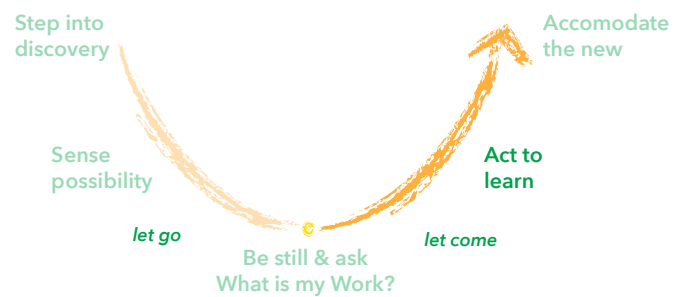
Isaac Prilleltensky (2019) Mattering at the intersection of psychology, philosophy, & politics. *American Journal of Community Psychology* bit.ly/3QNEmO4 More at www.professorisaac.com

James Hillman (2013) [Acorn theory](#).

DISCOVERING What more is possible

Leadership in Person-Centered Planning

Session 4: Claiming Blue Space

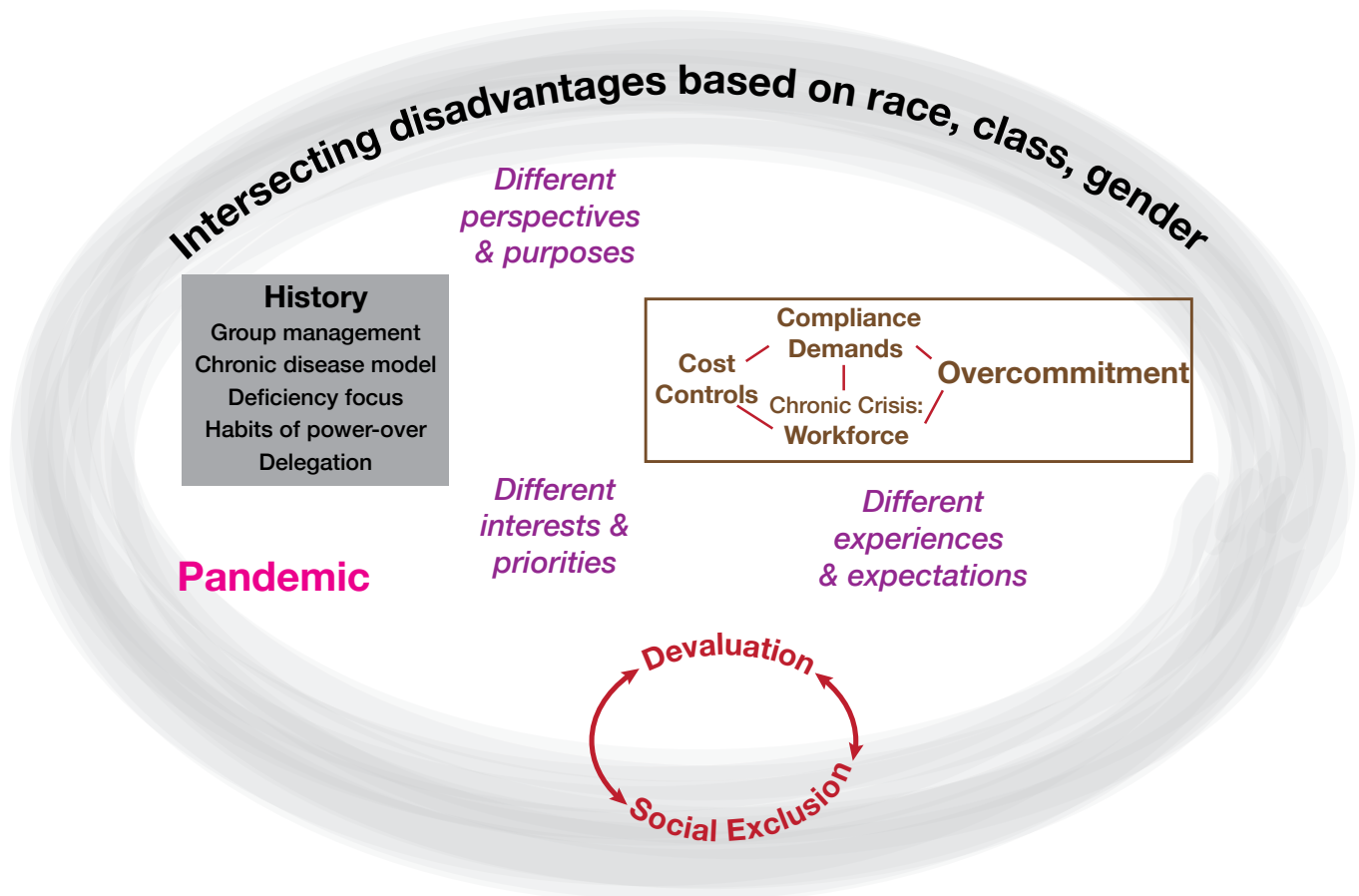


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WORKING FOR JUSTICE

The ADA recognizes the right of people with disabilities to be free of discrimination & take up valued roles in community life at home, at work, & in the life of their community.

The path to that right is often hard. Overcoming obstacles is more than a technical matter. It is ongoing work for those who feel an **ethical responsibility** to join others & co-create practical ways to resist the social forces that produce social exclusion & build a community that works better for everybody.



The HCBS Community Rule is founded on the ADA (Americans with Disabilities Act)

CLAIMING SPACE TO DISCOVER

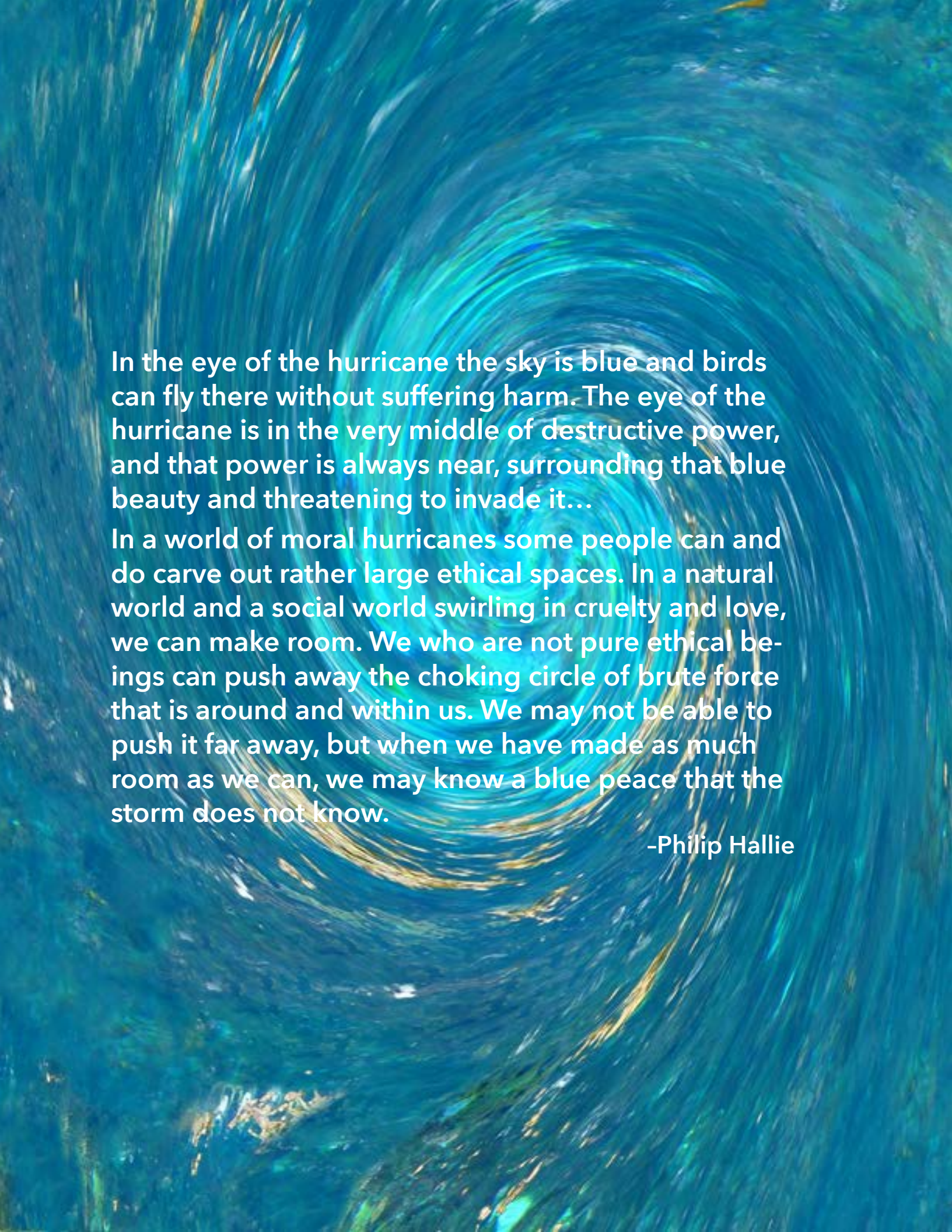
The work of discovering what more is possible puts a claim on time, flexibility in where & how staff work, & learning resources. Negotiating just enough of these resources to take the next step in discovery draws on our social capital & influence.

The inner work of resisting social exclusion also needs space. Co-creation of new ways to discover possibilities benefits from the collective wisdom & creativity generated by listening deeply to different perspectives, reflecting critically on the values at stake, & taking action aligned with highest purpose.

We call the place for doing this inner work **Blue Space**, an experience of spaciousness within & among us that welcomes uncertainty, questions settled structures & ways of thinking, & trusts thoughtful judgment of risks. Claiming Blue Space is a key to discovering what more is possible.

Hanns Meissner develops this metaphor in his book and in this short video with the same title as the book, *Creating Blue Space*
www.youtube.com/watch?v=cdtLWhW3Prg,

Hanns found the Blue Space image in the work of Phillip Hallie, a philosopher who served in World War II as an artillery officer. Looking for meaning in what he did & saw in that role led him to study the conditions for goodness to emerge despite the power of cruelty & social evil.



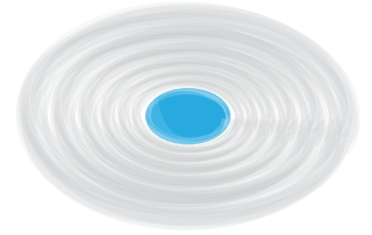
In the eye of the hurricane the sky is blue and birds can fly there without suffering harm. The eye of the hurricane is in the very middle of destructive power, and that power is always near, surrounding that blue beauty and threatening to invade it...

In a world of moral hurricanes some people can and do carve out rather large ethical spaces. In a natural world and a social world swirling in cruelty and love, we can make room. We who are not pure ethical beings can push away the choking circle of brute force that is around and within us. We may not be able to push it far away, but when we have made as much room as we can, we may know a blue peace that the storm does not know.

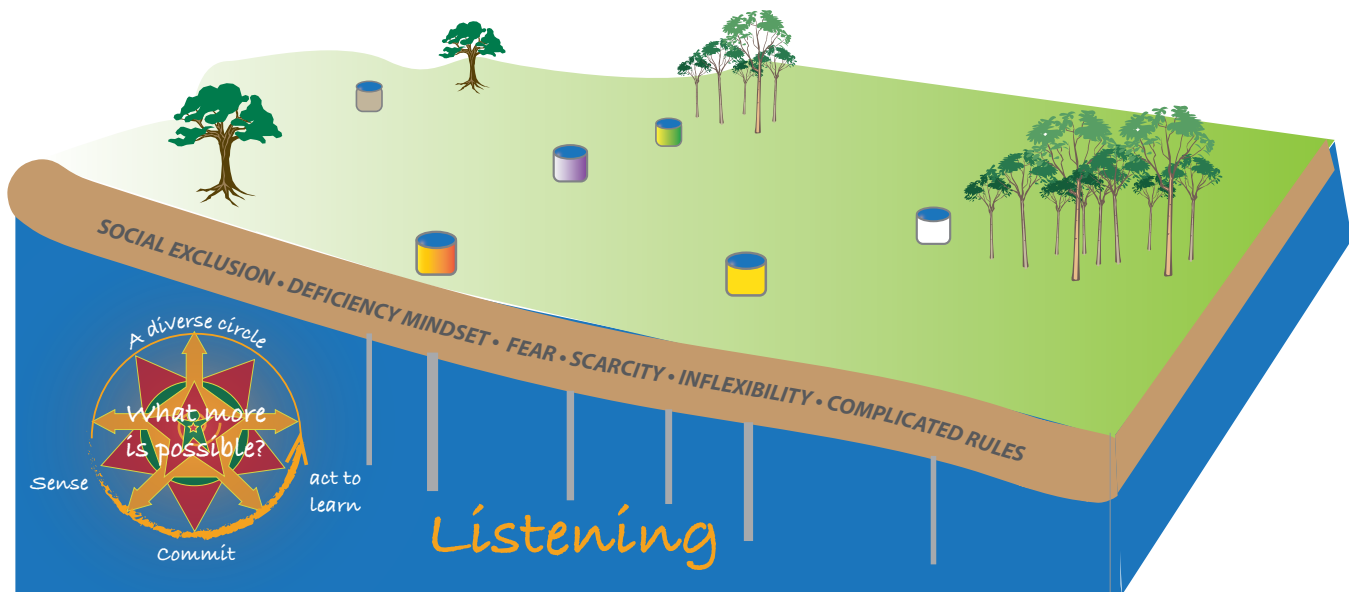
-Philip Hallie

A little bit more Blue Space

In conversation, explore possibilities for increasing Blue Space in your life at work. Things you might do to open space for deeper listening, critical reflection & creative thinking, & dialogue that enriches discovery of what more is possible.



- Identify specific steps that could open a little bit more Blue Space in...
 - ... person-centered planning meetings, preparation and follow-up
 - ... team meetings.
 - ... supervision
 - ... training activities.
 - ... anywhere
- Choose a top 3 possibilities and choose someone to type them into the Chat so we can capture some of your thinking.



Wellsprings of Good Person-Centered Planning

Person-centered planning as we know it was first named in the early 1980s. Since then the field has generated many forms of person-centered planning. Their inventors created different procedures, in different circumstances, to realize different possibilities.

Beneath this adaptive variety of methods, common wellsprings nourish good person-centered planning. Good person-centered planning taps the waters of life by reaching through a hard, dead layer formed of habits of social exclusion, deficiency mindsets, fear, scarcity, inflexibility, and complicated rules.

By listening deeply, participants in good person-centered planning bring their work alive and animate the search for a desirable future.

They act from gifts of convening and boundary crossing to form a diverse circle who hold the animating question, What more is possible for this person?

They call on the gifts of testing assumptions and searching for new ways to know. They ask: how might this person experience even more of the benefits of belonging; even greater respect for their gifts; even more opportunity to share the ordinary places and activities of community life; even greater contribution to their family, friends and community; even greater choice and control of their lives.

The circle invites its members to follow the path of co-creation, stepping away from more of the same, sensing new possibilities, being still to form a commitment to creating the new, learning through confident action.

In each form of person-centered planning, deep listening shapes and is shaped by a circle of people with diverse gifts who hold the question, What more is possible?, and support one another to follow the path of co-creation.

From this shared work flows new ways of organizing support for valued experiences.

The work calls on diverse gifts: the capacity to make room for new understanding by listening deeply, the ability to reach across boundaries to convene a circle of co-creators, the willingness to test familiar assumptions and reach out for new ways to know, the confidence to co-create the new.

Bringing these gifts into the service of a person's valued future keeps person-centered planning alive.

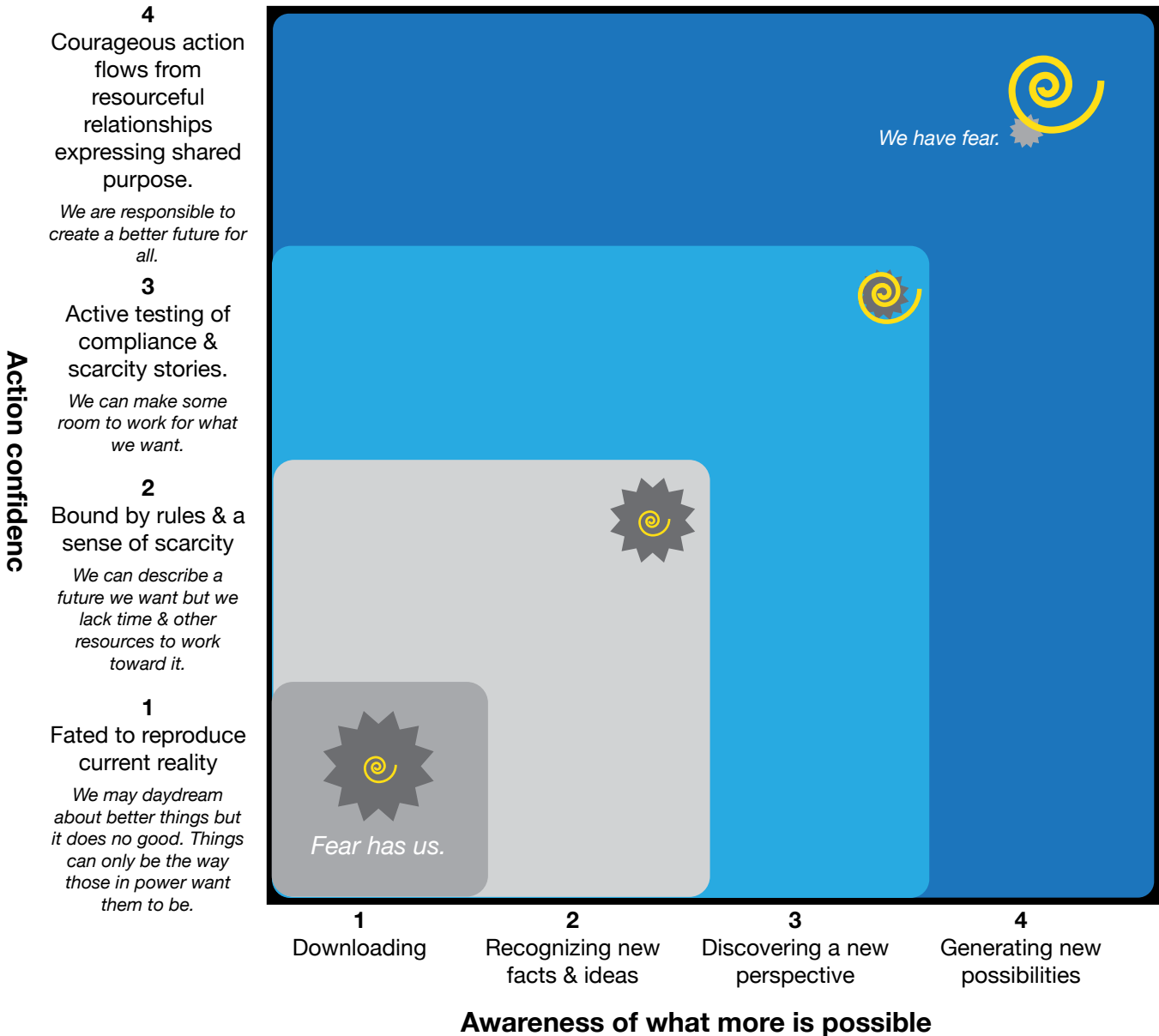
Staying alive

In conversation, share practices that have worked for you to...

- ...stay strong and energized.
- ...renew your focus on what is most important.
- ...strengthen your relationship with those you support and the people who matter to them.
- ...increase your knowledge of what more is possible for you and those you support.
- ...learn by reflecting on action.

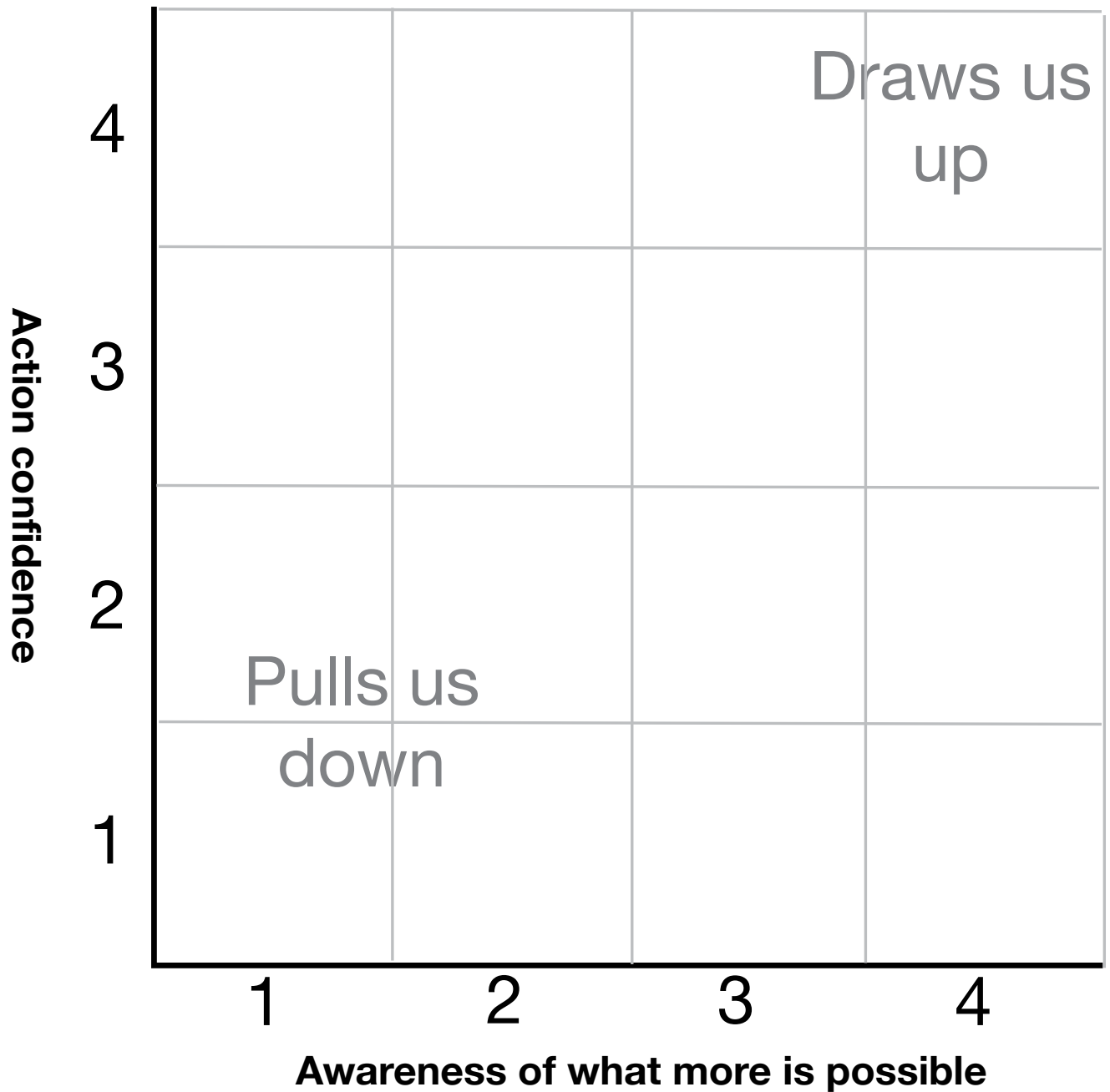
Listen for a practice you want to learn more about from the person who shared it.

Mapping the inner state of leaders



Leaders in co-creating person-centered supports know that they can bring their gifts and capacities into any available opening to discover what more is possible. They realize that their capacities for building relationships across boundaries, listening deeply, recognizing the new that wants to be born with their help, crystallizing vision, and taking courageous action to learn better ways determine the possibilities for meaningful change. They take responsibility to develop these capacities.*

* *Pathfinders* has more about this practice on pp. 163-165.

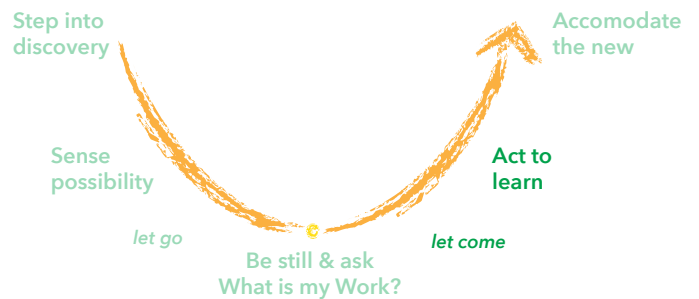


- Thinking about yourself and your colleagues, identify as specifically as you can...
 - ... what draws you to higher Action Confidence and higher Awareness of what more is possible (4,4)?
 - ... what pulls you toward lower Action Confidence and lower Awareness of what more is possible (1,1)
- Draw on your intuition and mark the place on the chart that describes the most common place your organization currently rests.

DISCOVERING What more is possible

Leadership in Person-Centered Planning

Session 5: Acting to learn I: The Case Clinic



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A fabulous image of many ways of knowing goes here

MANY WAYS OF KNOWING

We are embodied knowers, capable of learning when we join together & take action shaped by what we sense when we open heart, mind, & will to discover what wants to be born with our help.

We have many ways to make meaning & find direction. Unfortunately some approaches to administration try to trap us in our heads. Entering a jargon of words & numbers in the proper forms draws attention away from what whole people can know & do together.

Words & numbers find their proper context in the stream of images, movements, artifacts, songs, & stories that flow through a mobilized network of people making new relationships in order to discover what more is possible.

As relationships grow more diverse & better connected to discover new possibilities, collective imagination, collective intelligence, collective wisdom, & collective goodness can emerge in action.

The Case Clinic practiced in this session makes room for multiple ways of knowing.

TWO KINDS OF WORK

	TECHNICAL PROBLEM SOLVING	MEETING ADAPTIVE CHALLENGES
Definition	Clear & widely agreed.	Conflicted: surfaces differing values & interests, different ways of thinking.
Solution	Shared view of best practice or good practice, method for problem solving, & appropriate metrics.	Uncertain. Must be co-created through cycles of action learning.
Perceived threat of loss	Low to moderate.	Moderate to high: questions settled identities, roles, boundaries, ways of thinking, structures, routines, & practices.
Time to negotiate resistance	Low: can check & require compliance.	Moderate to high: requires at least some degree of personal commitment.
Demand for inner work.	Low.	High.

Engaging adaptive challenges test our belief that our action can make a difference, our action confidence.

Many adaptive challenges have their source in unquestioned, even unconscious, assumptions like these:

- We know all we need to about who people are & what they need. We can accurately predict what is possible for people & what is unrealistic.
- We can accurately assess risk in any situation, present & future.
- We know what is best for people & are responsible to enforce compliance.
- We know all we need to know to our jobs.
- Our work is already as person-centered as it is possible to be.

Naming adaptive challenges

Remember

Anyone practices leadership when they face an adaptive challenge & involve others who share the challenge in dialogue to better understand the challenge & action to move into & through it.

Anyone touched by an adaptive challenge owns a part of it even when changes in structures, systems, & social attitudes could relieve the challenge. We can exercise power-with others by finding a way to adapt that aligns with the discover what more is possible.

It is more powerful to attend to co-creating a future that works better for everyone than to avoiding what we fear.

Name one or more adaptive challenges you currently face

A situation or question you are up against where...

...you genuinely want new perspectives & insights; you can suspend your desire for a magic answer or to validate your favorite solution.

...meeting the challenge would make a real difference to discovering what more is possible.

...you have some responsibility for finding a way to meet the challenge.

...technical problem solving isn't enough.

Case Clinic

See a challenge
with fresh eyes

A **Case Clinic** accesses the wisdom & experience a team of 3 to 5 to discover fresh ways to understand & co-create ways to meet one team member's leadership challenge. This exploration provides the person presenting the challenge new perspectives & insights & the whole team an opportunity to understand their work better. Adaptive challenges are a better focus for the Case Clinic than technical problem solving is.

Be mindful

- The purpose is to listen deeply, attending to, sharing & building on the images, metaphors, feelings and gestures that the challenge story evokes in each team member. 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 & allocated times, which guide the team 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 time that allows **an hour of focused attention**. Writing & 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 team attends to & 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. Others can take notes of key points & graphically record images that arise throughout the process.

Based on *Case Clinic*, instructions & video at www.presencing.org/resource/tools/case-clinic-desc

1	2 min	Select challenge presenter, timekeeper, note taker, & image recorder
2	15 min	<p>Intention statement by challenge presenter</p> <p>Take a moment to reflect on your sense of calling. Then present your challenge, answering these questions:</p> <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? <p>Coaches listen deeply. They may ask clarifying questions but not give advice or make observations.</p>
3	3 min	<p>Stillness</p> <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	<p>Mirroring and embodying</p> <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	<p>Generative dialogue</p> <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	<p>Closing remarks</p> <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

Journal on the Case Clinic

Reflect on both learning from dialogue on the challenge & the Case Clinic process.

What would it take to try a Case Clinic back home?

Use this space to sketch a plan to involve 2 to 4 others back home in a Case Clinic.

- Who would you invite? Tip: start with interested allies.
- What main points would you make in the personal conversation where you invite them?
- Imagine yourself as the challenge giver, what would you choose?
- Meeting in person is preferred. If that;s possible, where would you meet?
- If this didn't happen, what are the most likely reasons?

DISCOVERING What more is possible

Leadership in Person-Centered Planning **Session 6: Act to learn II: Crystallize & Just Start**



NEW YORK
ALLIANCE FOR
INCLUSION & INNOVATION
Strength Together

How might we build our capacity to
discover what more is possible
for the people we support
& for our organization?

Just start



When we listen deeply we discover desire for more of good community life among the people we support. When we act together to cross the boundaries drawn by social exclusion we discover community willingness to welcome contributions from people who have been left out.

We can't just use our heads to predict the path along which people's desire for more will meet community willingness to adapt. To find out what more is possible we have to engage our whole selves-head, heart, & hands-in discovery.

Wherever we are, organizationally & personally, whatever the constraints that bind us to more of the same, there are next steps to deeper listening & more flexibility for co-creative action. There are cracks where the seeds of support for community life can grow.

We have the opportunity to identify a change worth investing in and decide to **Just Start**.

Listening to your hands

Purpose

Your purpose is to explore a change you want to bring to life, a change that will strengthen the positive influence of person-centered planning. It may be a change in your own practice or a change in your organization as long as the intention is to increase your ability to do your Work.

Your whole body knows the situation that wants to change with your help. Your whole body knows a change that has meaning for you. Some of what your whole body and mind know has not yet found words.

Steps

This practice invites you to let your hands show your thinking mind what your whole self knows about how things are now and what wants to emerge next. It asks you to let go of thinking up a plan and pay attention to what emerges as you make two sculptures.* Sculpture I models the situation as it is now. Sculpture II shows the very next stage of development.

- Take a moment to lay out whatever you have collected to sculpt with. Center yourself with three breaths.
- Set a timer for 5 minutes. Each works alone to form Sculpture I to reveal how it is now in the situation that wants to change with your help. Let your hands show you the elements of the situation that matter and the ways these elements are related.
- Take a picture of Sculpture I.
- Set a timer for 2 minutes. One sculptor takes a turn reflecting on their Sculpture I What needs to end in this situation? What wants to emerge. Repeat for the other sculptor
- Set a timer for 3 minutes for each sculptor to work alone. Attend to Sculpture I and make changes to reveal the next stage of the journey to the future you want to create. Feel for where a shift wants to start and what that first move will change.
- Take a picture of Sculpture II.
- Each sculptor takes 2 minutes to reflect on the change from Sculpture I to Sculpture II and to answer two questions.
 - ... “Where does the shift from current reality start?”
 - ... “What could I do next to give life to this emerging future?” .

For this practice, a model isn't an exact representation or illustration of steps in a plan. You assemble materials at hand to express your situation and what is emerging in a form that holds meaning for you.

You are on track when your thinking mind is witnessing what your hands are making.

* If you don't have materials to model with you can sketch 2D models. Access the childhood imagination that could make a castle or a space ship out of a cardboard box: You can make a model with almost any collection of objects..

Adapted from *3D Mapping*. .

Collect materials

Paper clips & other stuff from the desk

Kitchen tools

Legos



Stuff from nature

Boxes & containers

Matchsticks

Play-doh

Jewelry

Stuff from your junk drawer

Kids toys & figures

Toothpicks

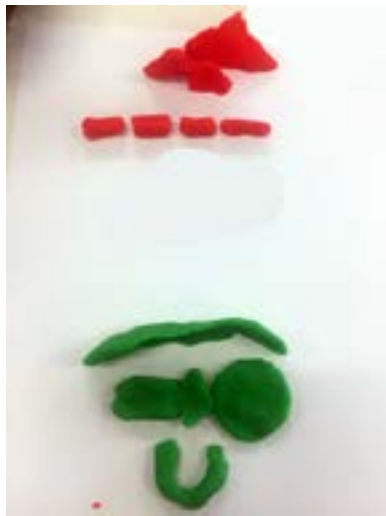
Sculpture I Now



Sculpture II Next



Beth Mount's stories about these sculptures are at www.youtube.com/watch?v=mgP-phhiLKS0&feature=emb_logo



Just Start

Just start* is more than a slogan, it's a well defined process based on the study of successful entrepreneurs.

1: Form intention based on what you currently know about greater capacity to discover what more is possible. This is a seed of the new. Your understanding of this intention will change as you act.

2: Find an opening. This is the space where the seed can find just enough of what it needs to grow. Sometimes openings are spacious and generously resourced but often they will be more like cracks in the pavement

3. Act quickly with what you have. It's easy to think you have to have a detailed plan, a complete supply of resources and wide buy-in & authority before you shift into action. But t meaningful action can emerge from redirecting the time and capacities of two or three willing co-creators who take responsibility & thoughtfully attend to risk & requirements. Time pressure can be a friend if it pushes toward action. Aim for a doable but real stretch beyond habit that somehow communicates the possibilities of the new.

4. Observe what happens, inquire into what works & the enabling conditions that make what works possible.

5. Build on what you find: revise and take a next step. Do more of what works, to reveal what more is possible, less of what does not.

6. Bring others along. As action unfolds and expands, you meet more people who can contribute (or block). Invite them into the next action cycle.

* See Leonard Schlesinger. New Project? Don't Analyze-Act. *Harvard Business Review*. hbr.org/2012/03/new-project-dont-analyze-act

What has become possible because we have been here?

Journal

- I want to stay in contact with...
- I want to learn more about...
- An idea or possibility I want to share at work or at home...
- Something I want to try in my practice of person-centered planning...
- A change I want to find an opening to co-create with a person...
- A change I want to find an opening to co-create in my organization...
- Questions I want to keep exploring...

Share

- Divide the time equally. Each take a turn...
 - ... choose a change with heart for you. Just let your intuition guide your choice, don't over think. Don't worry if the change seems too small or too big.
 - ... briefly describe the change and what makes it meaningful to you. Don't worry if you have talked about this change before. Each retelling will bring more shades of meaning.
 - ... identify what you will have to let go of as you move into this change.
 - ... name the way you could "just start".
- After each has had a turn, begin again with another change and go around again. Keep going until time is up.

Decide

- Just for yourself, make a decision about your intention to move from talk in a workshop to a real step into discovery
- Make an entry in you calendar or your to do list to commit to the very next step.
- Put a symbol, a word, or a phrase that captures the heart of the change here:

