

Discovering What More Is Possible

Leadership in Person-Centered Planning

Online Version

Version 2

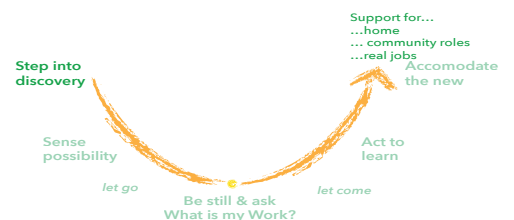


DISCOVERING What more is possible

Leadership in Person-Centered Planning

Session 1: Listening

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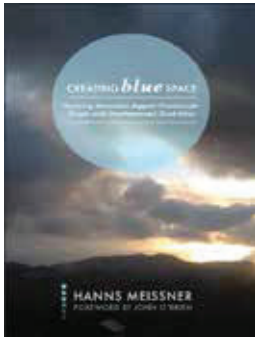


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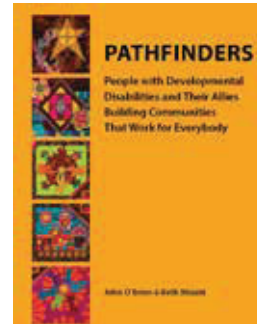
Institute Faculty: Beth Mount, Hanns Meissner, Christopher Liuzzo & John O'Brien, who wrote the Field Book on behalf of the whole Faculty.

The understanding of Person-Centered Planning, The CMS 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 & 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 & 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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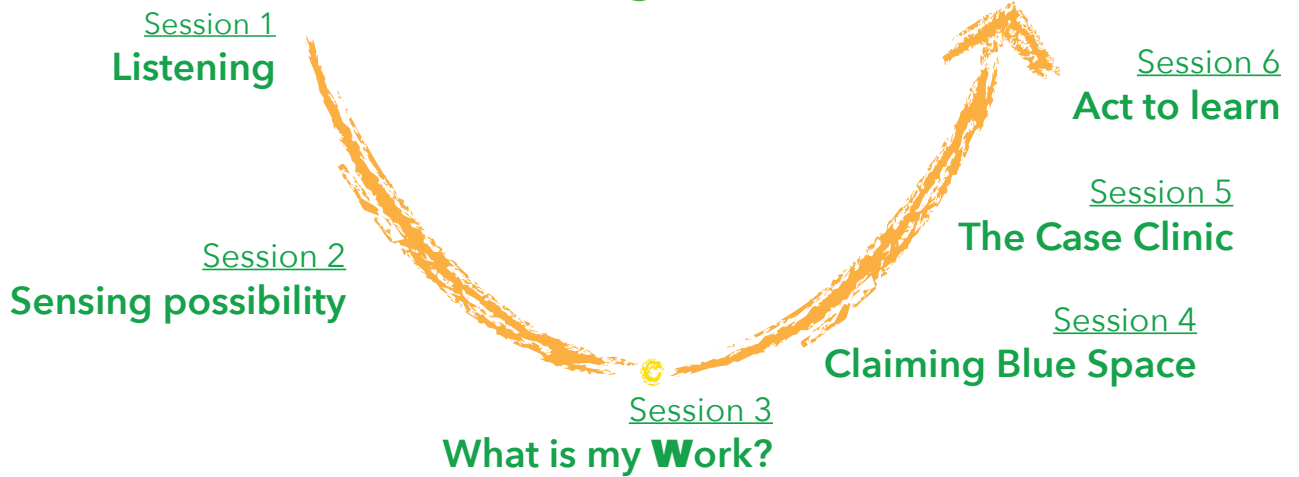


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Learning Institute Course Map

To increase our ability to practice leadership in **discovering what more is possible** for people we support & for our organization.



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.

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.**

Discovery of what more is possible for a person & for an organization follows this path.



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

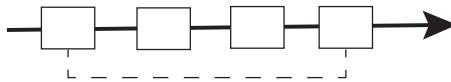
-Judith Snow



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.

Change results from skillfully following established procedures.



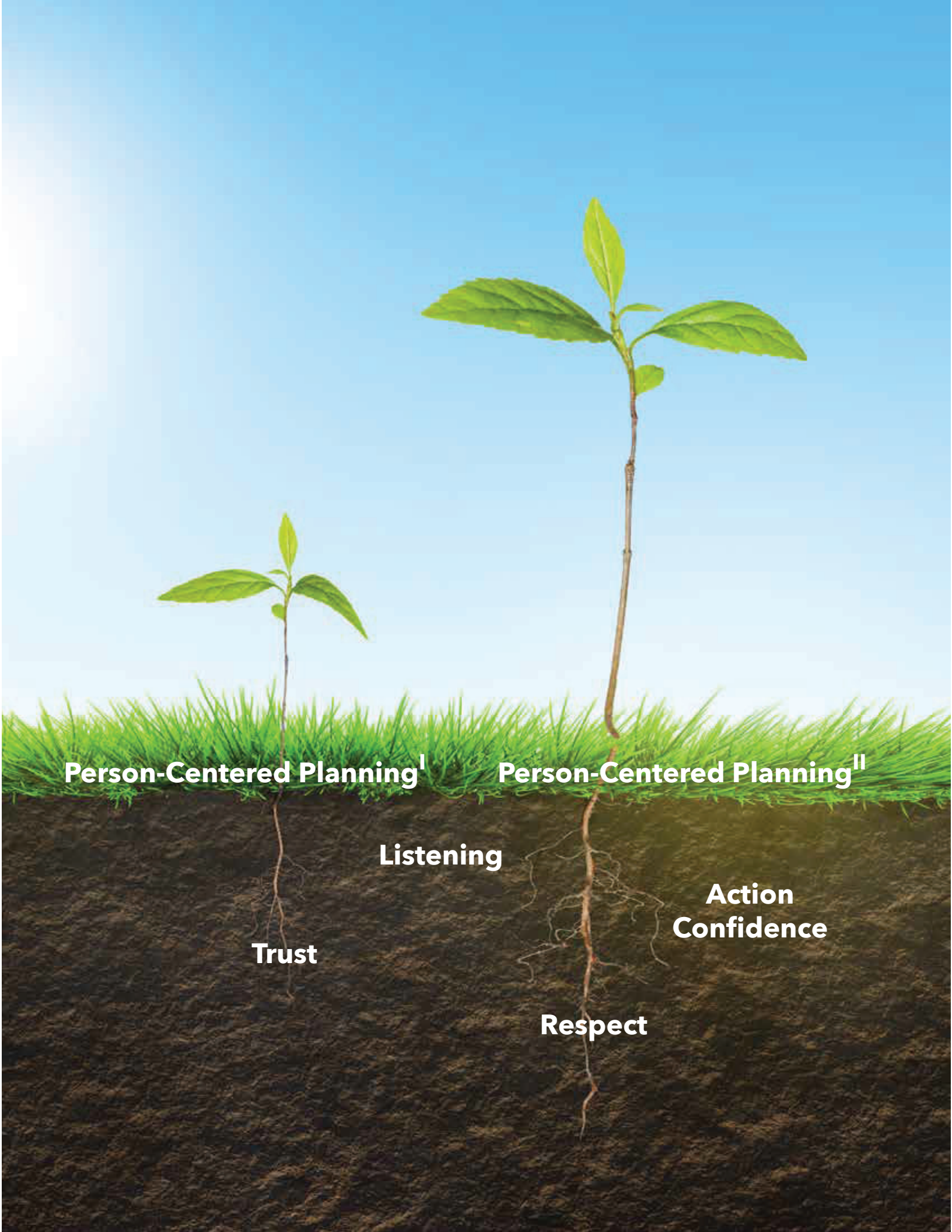
- ✓ select services
- ✓ define goals
- ✓ document

Person-Centered Planning^{II} activates & guides a search for what more is possible. The person is a co-creator of the path to discovery. Opportunities to offer new forms of support in new ways show up.

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.



Person-Centered Planning^I

Person-Centered Planning^{II}

Listening

Trust

**Action
Confidence**

Respect

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 voices** in the supports they need to live a good community life?

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

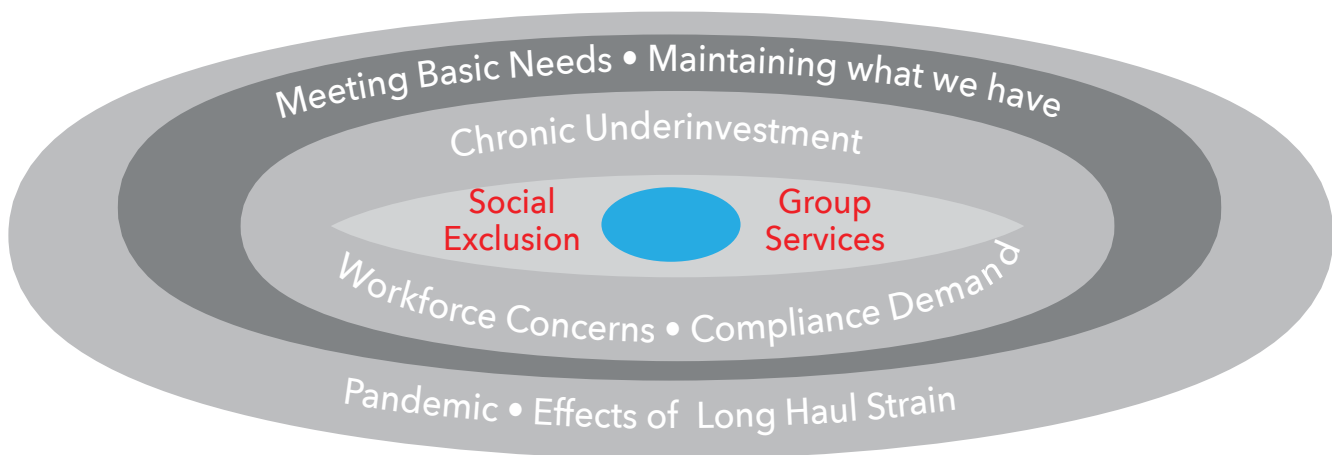
In *The Community Rule* CMS reflects the achievements & aspirations of people who count on HCB Waiver funded services. The Rule calls us to keep improving our capacity to serve these purposes:

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 their personal & organizational capacity to discover what more is possible.



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 & 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, letting go of 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.

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 & 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 & 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, offering 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 & let go of judgment & 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.

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; & 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.

LET GO OF DISTRACTIONS



The **Voice of Judgment** makes the mind busy sorting: realistic from unrealistic, possible from impossible, right from wrong, & on & 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 what is taken for granted.



The **Voice of Cynicism** drains feeling, meaning & 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 & 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 life & inquires to find more.

The search for what more is possible challenges fixation on the past by looking to the community 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 LEVEL 1 downloading	Just what I expected.	No new understanding. No increase in desire to act. Mostly a repeat of the same ideas.
<i>Open Mind expresses curiosity & quiets the Voice of Judgment</i>		
Listening LEVEL 2 debating	I became aware of some new facts & 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 & tames the Voice of Cynicism</i>		
LISTENING LEVEL 3 dialogue	I have seen the situation, & 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 & how they feel it. My own feelings resonate with those of someone different from me.	Awareness of real differences in experience & 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 & transforms the Voice of Fear</i>		
LISTENING- LEVEL 4 collective creativity	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 stronger sense of the highest possibility in the situation & an increase in the will to bring that purpose into reality.

The table is based on a video on levels of listening presented by Otto Scharmer in the edX course, *U.Lab* www.presencing.org/news/news/theory-u-introduction.

***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 will we see & hear about as person-centered planning becomes an even stronger influence in people's lives?

- 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 of person-centered planning?

- 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 on 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 the 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 12)** 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

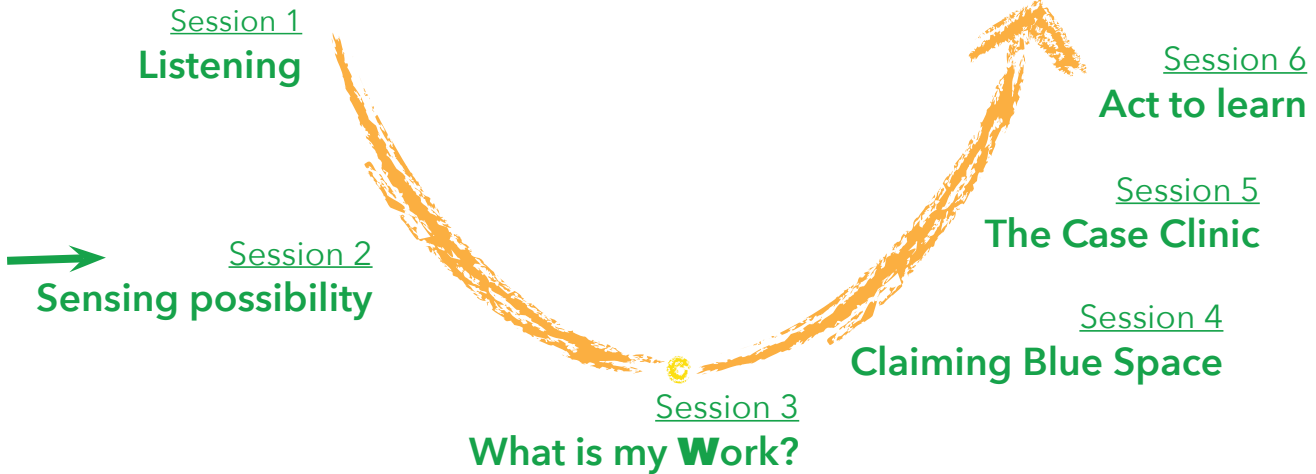
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Learning Institute Course Map

To increase our ability to practice leadership in **discovering what more is possible** for people we support & for our organization.



Publication information is on page 2 of the booklet for Session 1.

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 even to earn enough to feed our families. Our to-do lists pull our attention to meeting survival & system requirements, devouring time for the relationships that give meaning to our work. Too often we are tired & put off rest & renewal. We can be impatient for quick fixes, too hurried & depleted to reflect & explore. We rely on habit & settled ideas to get by. Our system prizes efficiency, chopping services into 15 minute increments. Person-centered planning can slip & become a routine transaction.

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 often express satisfaction with what we offer.

The first step toward discovering what more is possible is to intentionally step into discovery of what more is possible, choosing a search that will disrupt settled knowledge & challenge us to co-create new, valued experiences in community life.

HONOR DESIRE FOR MORE

The desire for more of a good life expands possibilities for individualized supports 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, 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**.*

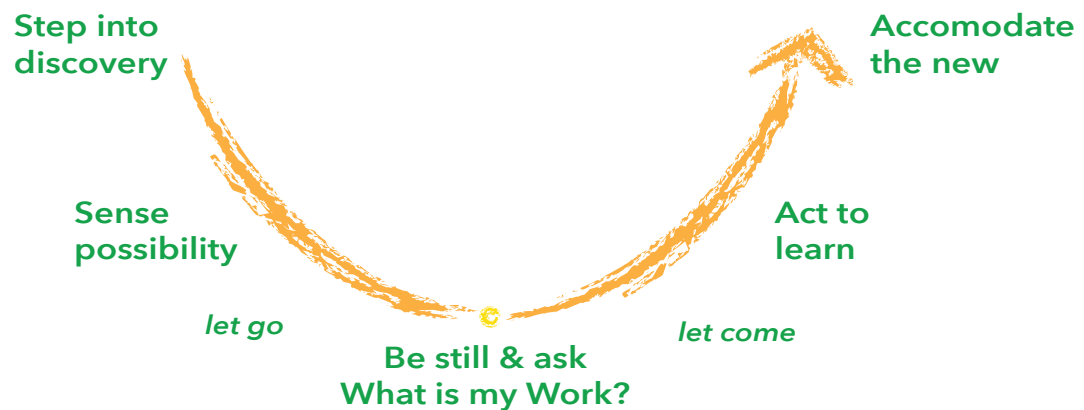
This way of organizing change can bring new possibilities to life for individuals, for organizations, for systems, & for communities. It opens a fertile field for any person-centered planning facilitator who wants to discover a person's interests & gifts & develop valued community roles. It can guide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

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.

*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.

DISCOVERY



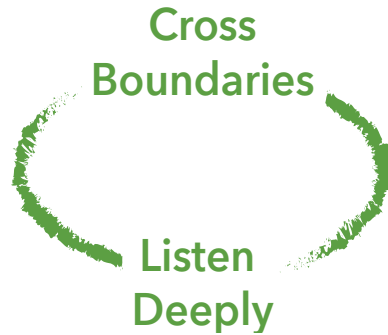
This summarizes the practice of **Awareness Based Collective Action**.

- 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 the journey & invite a small, diverse group to join. Let go of downloading, & tame 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 assumptions that have 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** & 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 Session 5: 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 search by 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 time we set free. For a few quiet minutes there is no urgent problem to solve, no business to be done, no one to persuade. Difference is received as a gift that expands awareness of possibilities. When another perspective differs from expectations it can fire imagination. 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 30 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, administrative & clerical staff
- ...the founders & past leaders of your organization
- ...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>		
Listening 2 <i>debating</i>	I became aware of some new facts & 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, & 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 & how they feel it. My own feelings resonate with those of someone different from me.	Awareness of real differences in experience & 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.
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 & hear about & this is why. These are two or three people I would like you to meet & this is why I want you to meet them.

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 30

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 better able to discover what more is possible if...

- **Name one or two changes that would make your organization even stronger in discovering what more is possible,**
- **Identify one big obstacle to making those changes & two or three reasons that the 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 38

Mapping the Evolving System

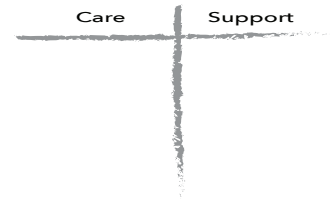
	 Institutional Care	 Managed Care	 Integrative Supports	 Community Supports
How we see people who use long-term support	As tragic & vulnerable or dangerous	As consumers with clinical needs	As individuals with capacities	As citizens
Our design response	Create special institutions	Coordinate care	Offer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

This framework* tells 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 co-creating inclusive community. The shift from care in special settings (red & brown columns) to support in community life (green & blue columns) 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 management practices & ways of thinking. The Medicaid System calls for supports but retains many practices suited to institutional care. The poor fit between structures & management suited for care & the practices that encourage the development of support produces obstacles to discovering what more is possible.

* Adapted from Hanns Meissner, *Creating Blue Space*, Chapter 4. A more detailed table is on page 44. Hann's video talks on the charts , Part 1 www.youtube.com/watch?v=jC5_P4dpETM&t=1s Part II www.youtube.com/watch?v=hX-jfgn4x0s&t=4s

Make a "T" & label the left column Care & the right Support.



Identify two or three influences that move your organization into the future by encouraging the growth of person-centered Support (The right column, green & blue half of the table).

Identify two or three influences that pull our attention back to Care (The left column, red & brown half of the table).

Make quick sketch or find images on the Internet that capture something you notice about tensions between Care & 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 & their day to day decisions.

An institution is not defined merely by its size.

--Inclusion Canada

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: **Sensing Possibilities**.

- Renew your intention to Sense Possibilities each morning.
- Be attentive to interesting possibilities to strengthen capacity to discover what more is possible. A song on your commute, the cover of a magazine, an observation, a conversation, any of these might hint at a possibility worth considering.
- Notice how the Voices of Judgment, Cynicism, & Fear show up to try to discourage you from noticing what more might be possible.
- Take a few minutes at the end of the day to journal about the day's discoveries.

Practice

There are great resources close by. While inquiry with people new to you has great potential, even dialogue with someone you see everyday can surface interesting possibilities.

Choose one of the dialogue guides indexed on the facing page & invite a partner to share with you. Each practice takes an hour or so plus the time to make the invitation. Try following the guide just as it is written.

Notice what gets in the way. Don't worry if you can't get past whatever takes you away, awareness of what limits action can lead to helpful changes.

Watch

Hanns Meissner. *The Evolving System* Part 1 (10 minutes) www.youtube.com/watch?v=jC5P4dpETM&t=1s & Part II (14 minutes) www.youtube.com/watch?v=hX-jfgn4x0s&t=4s

Beth Mount. *Elements of Person-Centered Practice* (50 min). www.youtube.com/watch?v=tOQYi7G57oI

Read

John O'Brien & Chris Liuzzo. *Seeking Transformation* (5 page paper). [/inclusion.com/site/wp-content/uploads/2020/10/Seeking-Transformation.OBrien.pdf](http://inclusion.com/site/wp-content/uploads/2020/10/Seeking-Transformation.OBrien.pdf)

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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 & how the new comes to be. Suspend the Voice of Judgment & the Voice of Cynicism & access your sense of curiosity, appreciation & 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 & how to move deeper into it.
- Take what you hear & see as a starting point & improvise questions that deepen your understanding.
- Listen for & welcome glimpses into the best future possibility for those you meet & 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 & 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 & experience & 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 & 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 & 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 & why?

Dialogue Interview

A Dialogue Interview is a **reflective conversation** open to insights into the experience & 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 & 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 & 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 & guide the conversation. Then go with the flow, access your ignorance by attending to & trusting questions that occur to you & 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 &, perhaps, for moments of shared thinking.
- Make the most of presence -quiet, appreciative openness to the person in front of you- & silence. Don't interrupt moments of silence, but stay present. Notice & let go of distractions that take you out of the conversation.
- Listen for & welcome glimpses into the best future possibility for the person who is giving you the interview & for the whole situation you share with them.
- You are not there to sell or persuade but to listen & 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 & 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 & 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 (&/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 & landlords for people you support.
- Direct support workers & front line supervisors who are influenced by your work (don't forget administrative staff).
- Middle & 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 from the outside

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 & 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 & trusting questions that occur to you & 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 & welcome glimpses into the best future possibility for the person who is giving you the interview & 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 & 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 **giver**. 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 & clarify any concerns about confidentiality, attribution of what the person says & requested follow-up.
- Open your self to the person's perceptions, even when some of **them** 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 wen 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 & time

Sharing place & 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 & 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 & space with people whose voices are seldom heard.

Expand your experience

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 & 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 & 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 & flow of place & 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 & place & to the qualities of place that make this possibility visible.
- Be open to notice whatever about the place, activities & 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.

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

Steps

- Identify places you can learn from & 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 & 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 & 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 & 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 & 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 **an** 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 & 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 **made** you uncomfortable; what questions you have.
- Send those who make the sharing possible a thank-you note the next day.

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 & 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 organization's 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 & 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: re-designing 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 dialogue & 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

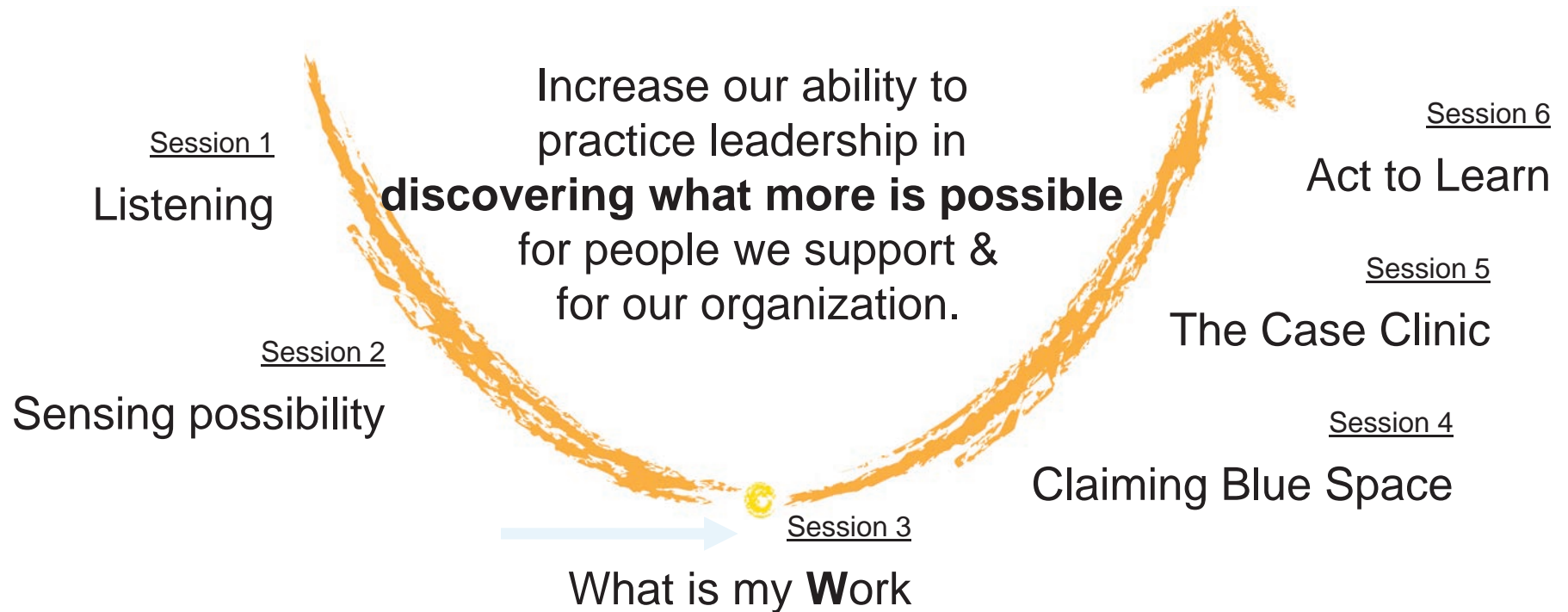
What more is possible

Leadership in Person-Centered Planning

Session 3: What is my **W**ork



Learning Institute
Course Map



In good person-centered practice people experience	The Learning Institute invitation
Respect & interest	Listening: Open Mind, Heart & Will
Invitations to share what makes me who I am	Dialogue Walk & practices in later sessions
Crossing boundaries to find better ways. Identifying obstacles we can tackle	Learning Journey, Dialogue Interview, Mapping the System
Actionable knowledge of how I want to matter.	Story of Deep Satisfaction, Journaling, Building Action Confidence, Making an Artifact



Instructions for Living A Life

Pay attention.

Be astonished.

Tell about it.

–Mary Oliver

work

Work

My contribution to the highest potential in this situation

A story of deep satisfaction

Divide the time equally & use a timer.

Invite each person to tell a 3 minute story of a moment of deep satisfaction. Take the whole time.

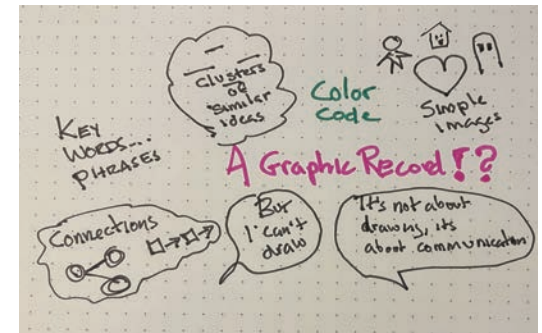
A moment of reflection:

- What did this experience give you?
- What did you contribute?

Listeners share the heart of what they heard: What is satisfying to the storyteller?

Listeners make a graphic record of the reflections.

Thinking about your whole time supporting people, 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.”**



KEY
WORDS...
PHRASES

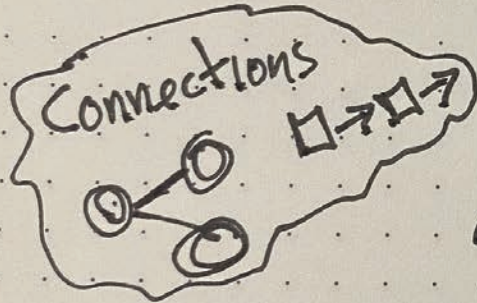
—
—
—
Clusters
of
similar
ideas

Color
Code



Simple
Images

A Graphic Record!??



But
I can't
draw

It's not about
drawing, it's
about communication





Building Action Confidence

What power can I bring to discovering what more is possible?



Divide the time equally & use a timer.

Each take a turn. Let quick answers come to identify the power of gifts & capacities

Don't overthink.

Let quick answers come to identify openings to make a difference.

Encourage adding more.

Where can my power make a difference?

My sources of influence at work

My job responsibilities

Changes I could invest in

My power with those who want more



My ways to make a difference



COLLAGE

QUOTATION

POSTER

PLAY-DOH

SCULPTURE

ar·ti·fact | 'ärdəfakt | noun

an object made by a human being, typically an item of cultural or historical interest.

MUSIC OR

LYRIC

SELECTION

QUILT
SQUARE

SYMBOLIC
IMAGE OR
OBJECT

YOUR CHOICE

LEGO
ASSEMBLY

Never doubt that a small group of thoughtful, committed citizens can change the world; indeed, it is the only thing that ever has. Margaret Mead

There is beauty in the mud!
LOOK FOR IT!

Dance with the Dragons

3 MATHS
1) We are already there
2) We can't get there
3) We'll write mandate
4) We'll get there



Keep it simple!

Breathe

You have to be ok w/ failure
Is it really a failure?
Minimize Intrusion
Social Change

Perfect is the enemy of the good

TTWWADI

Make hope palpable





Live with

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

No need to do anything differently, the invitation is just to add a bit of extra awareness to what you are doing anyway.

Each morning renew your intention to be aware of moments of meaning through the day. (They may occur in the job, in family or community life.)

Be attentive to (small) moments of satisfaction as you go through the day.

Take a few moments to touch sources of renewal: a song, a poem, a story, a reading that re-connects you to what matters.

Take a few minutes at the end of the day to journal about the day's discoveries.

Notice & set aside the Voices of Judgment telling you “I’m not creative” or “I don’t know how to do this.”

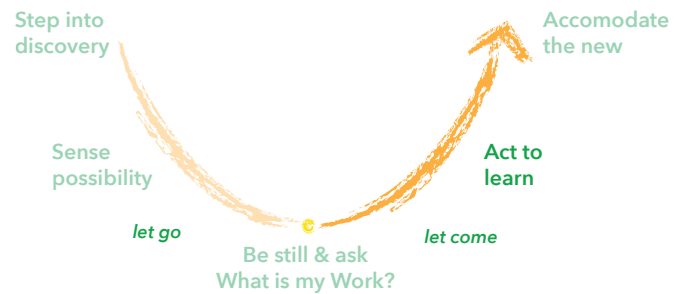
My work

Make an artifact that captures today's answer to the question, *What is my Work?* In images & words express what brings meaning & energy; the sense that *this is what I am meant to do.*

DISCOVERING What more is possible

Leadership in Person-Centered Planning

Session 4: Claiming Blue Space



NEW YORK
ALLIANCE FOR
INCLUSION & INNOVATION
Strength Together

Learning Institute Course Map

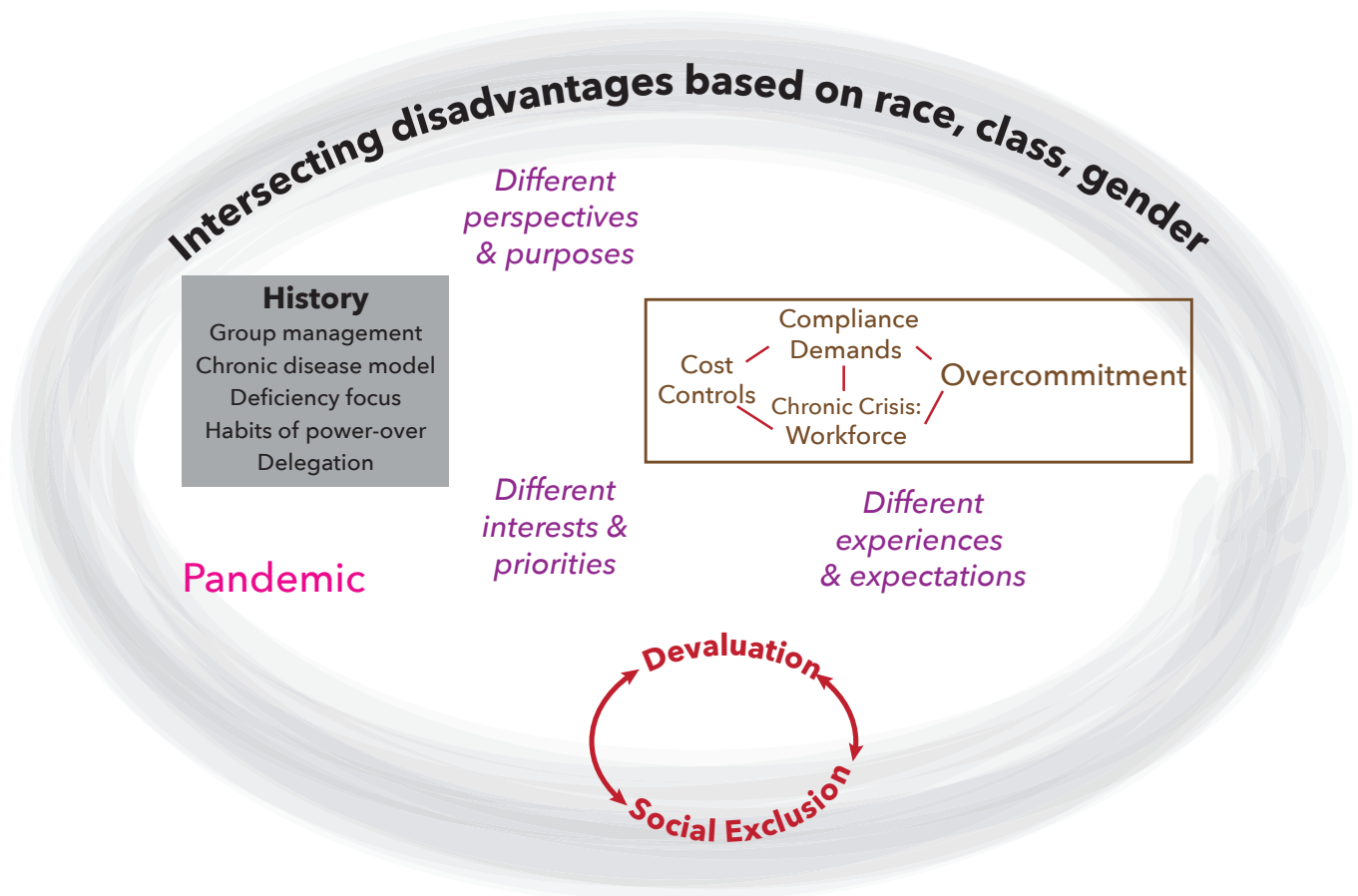
To increase our ability to practice leadership in **discovering what more is possible** for people we support & for our organization.



WORKING FOR JUSTICE

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

Moving forward calls on people who feel an **ethical responsibility** to discover what more is possible for people who are at risk of being socially excluded because they are seen & treated as less than whole people & full citizens. Multiple forces interact to make movement difficult.



* The Americans With Disabilities Act is the foundation for the HCBS Community Rule.

Presence/Absence

Any meaningful change has to navigate differences among the people involved. Good person-centered planning creates a forum for exploring differences in purposes & perspectives, interests & priorities, & experiences & expectation by encouraging deeper levels of listening & greater creativity in developing next steps. It is rare to dissolve all differences, but with skillful facilitation agreement on good next steps is usually within reach.

Changes that disrupt established beliefs & cross well defended boundaries, face the challenge of overcoming Absence, a social process that hides what more is possible. For example, consider the interacting forces that make congregating people on the basis of diagnosis seem like common sense. Whole systems of service are organized to deliver service to groups; individualized supports are still an exception. Common beliefs hold that people who need support are safer & better off in **groups defined by common diagnoses**. Absence hides the possibility of individualized support behind false certainty. Absence keeps us stuck in...

...onetruth: *You are 100% predictable. I know who you are, what you need, & what is possible for you.*

...us/them: *I know what is good for you & where you belong. I expect you to know your place & comply.*

...smallself: *We are completely person-centered. I know my job, there is nothing more to learn.*

No one is immune from slipping into Absence. When a next step into what more is possible threatens us, Absence...

... enlists the Voice of Judgment to defend, dismissing the change as unrealistic, impossible, & dangerous.

... numbs us to the harms of current practice & the human costs of failure to move toward discovery of what more is possible.

...enlists the Voices of Cynicism & Fear to discount our values & visions as foolish & unattainable.

...encourages withdrawal & blaming others for inaction.

...entrenches structures & practices that produce the harms of social exclusion.

Practicing Presence answers Absence with positive steps forward.

Absence

Distract & disconnect

Stuck in small self

Stuck in US v THEM

Stuck in one view

Numb

Withdraw

Defend

Entrench

Step into discovery

Accomodate the new

Sense possibility

Act to learn

Open mind

Open heart

Open will

Be still & connect with my **Work**

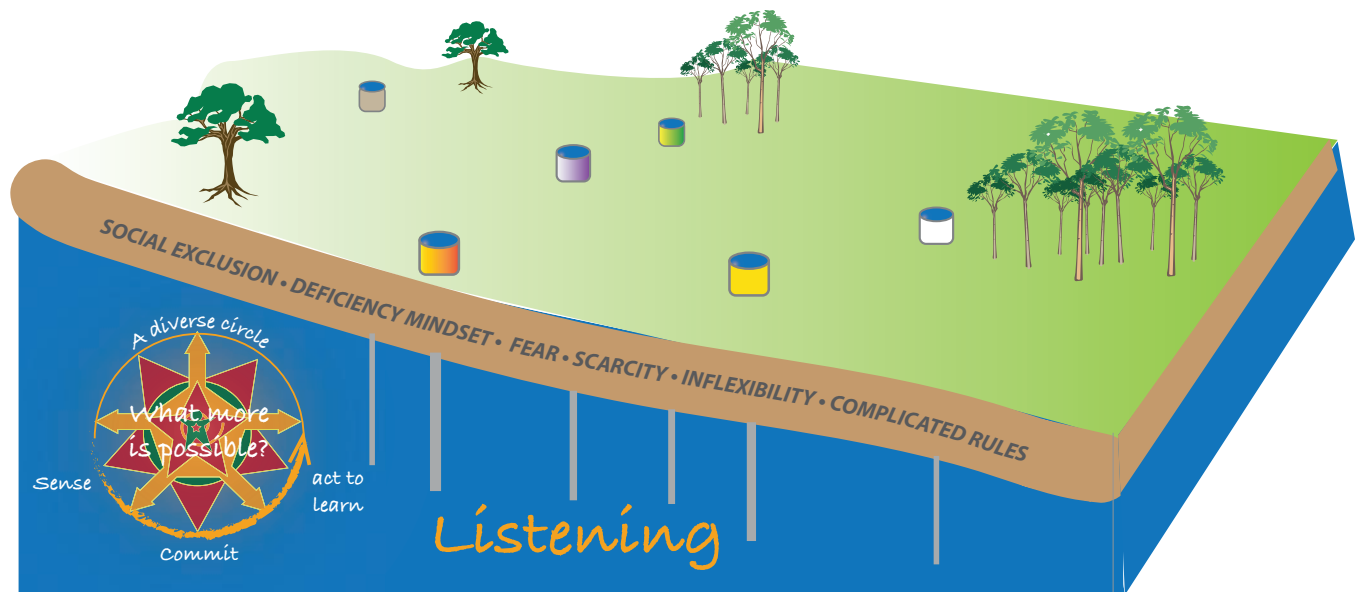
Presence

Staying alive

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

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

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



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, & complicated rules.

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

They act from gifts of convening & 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 & 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 & activities of community life; even greater contribution to their family, friends & community; even greater choice & 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 & is shaped by a circle of people with diverse gifts who hold the question, What more is possible?, & 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 & reach out for new ways to know, the confidence to co-create the new.

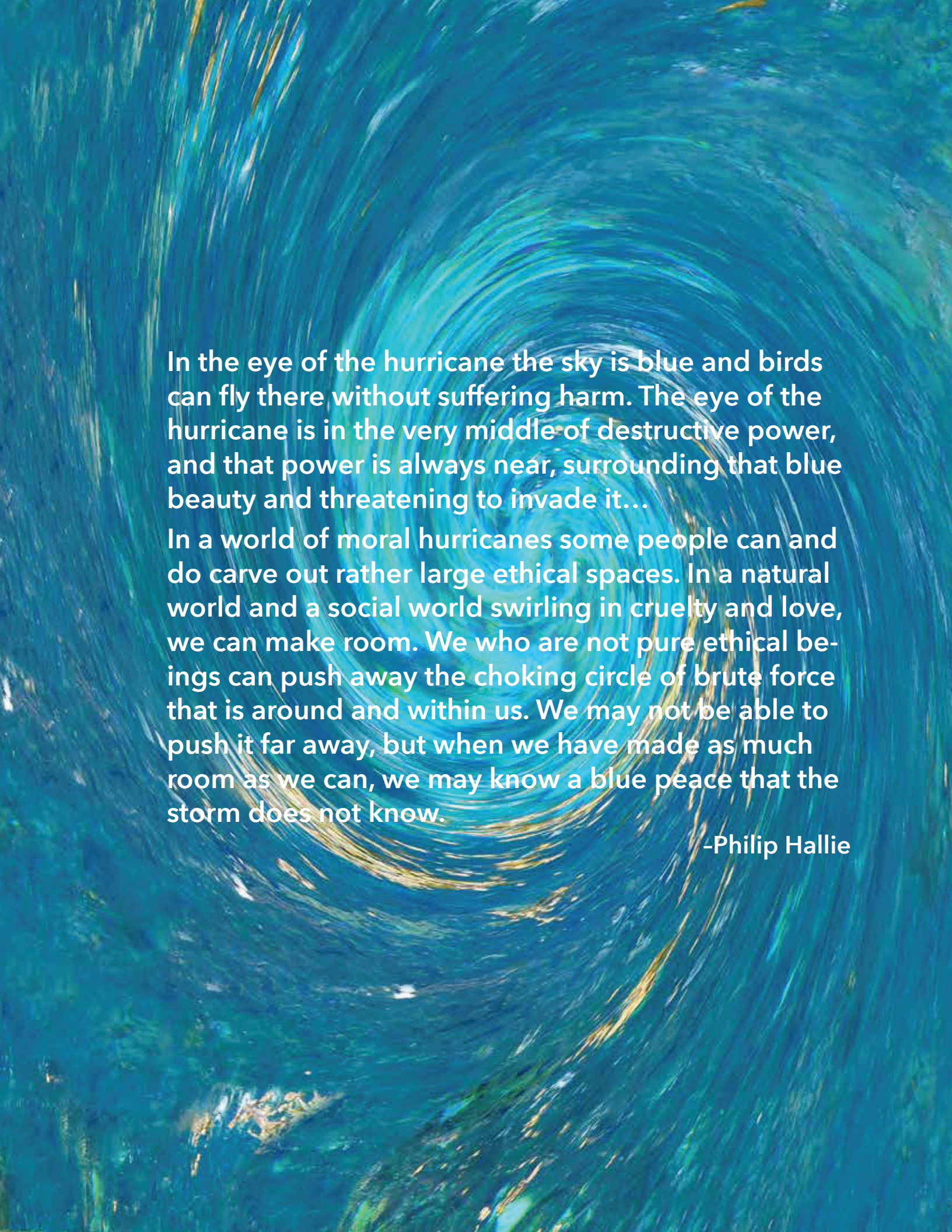
Bringing these gifts into the service of a person's valued future keeps person-centered planning alive.

Blue Space

Blue Space* names the quality of awareness that sets people free to discover what more is possible despite many opposing forces. It emerges when a person turns the beam of attention inward to observe their inner condition: their desire to matter, their part in structures & ways of thinking that limit discovery, the ways the powers of Absence hide possibilities from them, how the practice of Presence opens new ways.

Personal awareness encourages ethical action from Presence, reaching out to others with Open Mind, Open Heart, & Open Will. Deep listening to those with diverse perspectives generates clarity of intention, a shared sense of what wants to emerge with their help, & confidence that taking the next steps into discovery will make a meaningful difference. This form of conversation creates a shared Blue Space that can grow deeper & stronger as a support for the inner work of contributing leadership through discovery of what more is possible.

* Hanns Meissner develops this metaphor in his book & in this 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

Past participants on “a little bit more Blue Space”

“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.”

“The Learning Institute supported families to see how much they are important eyes & 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.”

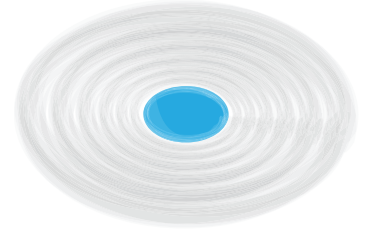
“The sessions give us an opportunity to push the pause button, to release from the daily grind & enter into self reflection. We take those small times to remember what we are doing & why. All else shifts from there.”

“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 & messy situations we are in.”

“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.”

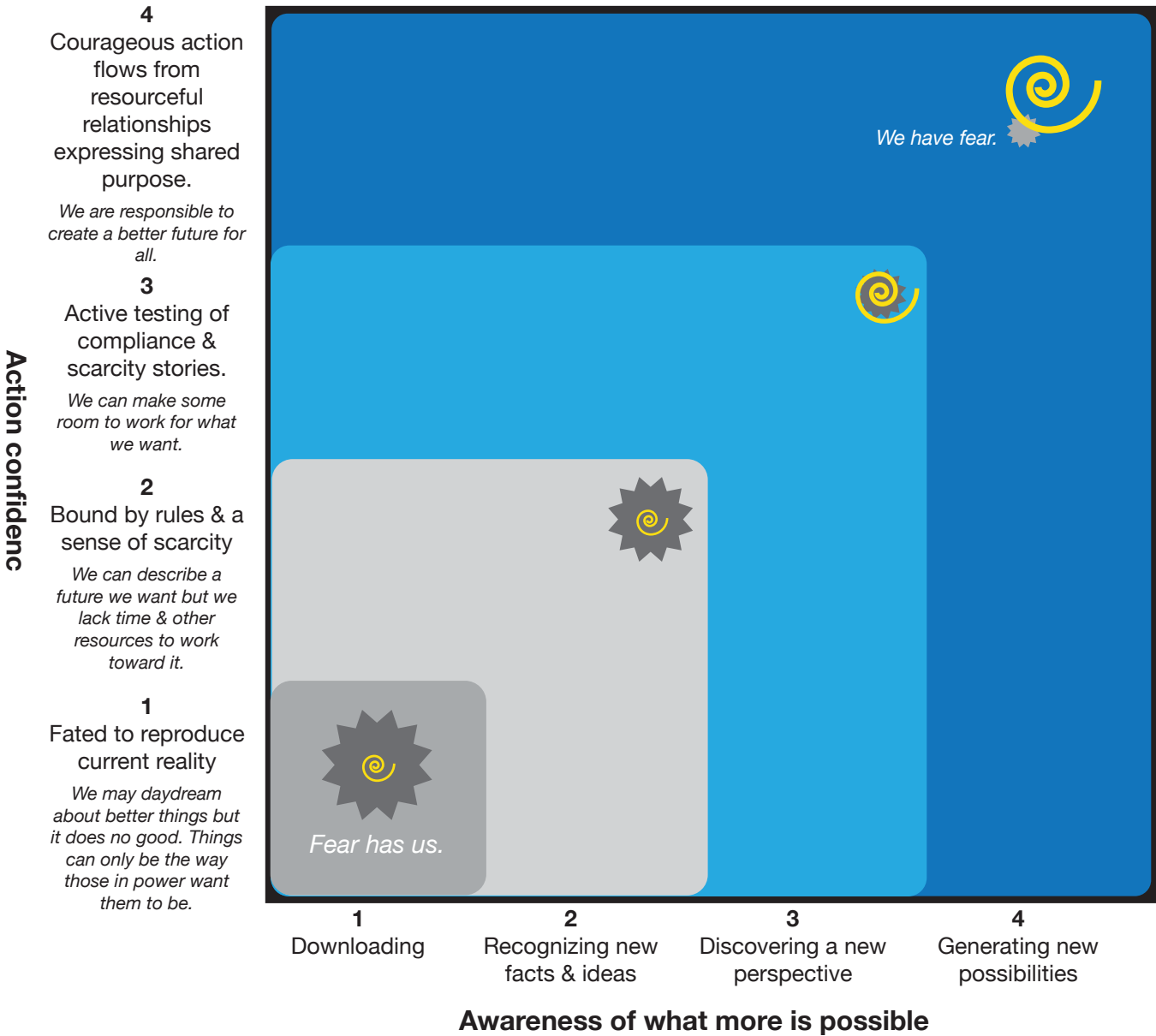
A little bit more Blue Space

In conversation, explore possibilities for increasing Blue Space at work. Identify specific steps you might take to encourage dialogue, generative listening, critical reflection & creative thinking,. Consider how to make a little more Blue Space in...



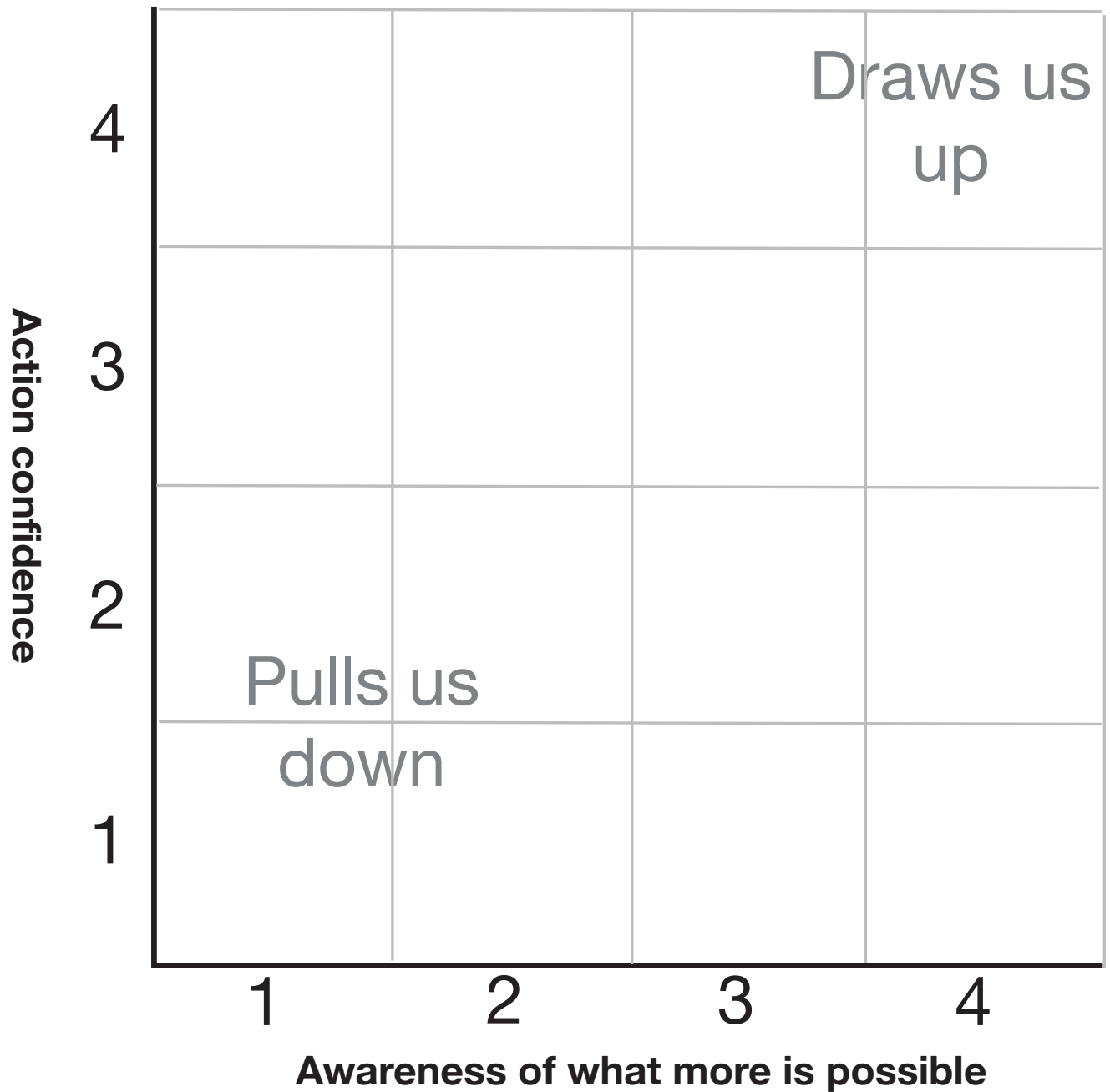
- ... person-centered planning meetings, preparation & follow-up
- ... team meetings.
- ... supervision
- ... training activities.
- ... here, in the Learning Institute
- ... anywhere
- Choose a top 3 possibilities & choose someone to type them into the Chat so we can capture some of your thinking.

Mapping the inner state of leaders



Leaders in co-creating person-centered supports know that they can bring their gifts & 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, & 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 & your colleagues, identify as specifically as you can...
 - ... what draws you to higher Action Confidence & higher Awareness of what more is possible (4,4)?
 - ... what pulls you toward lower Action Confidence & lower Awareness of what more is possible (1,1)
- Draw on your intuition & mark the place on the chart that describes the most common place your organization currently rests.

Looking further

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: **Blue Space**.

- Each morning renew your intention to be aware of opportunities for conversations about the future of person-centered practice through the day.
- Be attentive to opportunities for conversation about the development of person-centered practice. No need to initiate the conversation, just notice moments when it might be possible.
- Consider who you might invite to join you in conversations that create Blue Space. Think widely: co-workers, people you support & their families, friends or mentors outside work, your own family.
- Take a few minutes at the end of the day to journal about the day's discoveries.

Practice

Locating yourself on *Mapping The Inner State of Leaders* & naming what influences your position. Learn more from Beth Mount's video www.youtube.com/watch?v=JTujMfL4W0&t=3s
Make one move toward trying a practice you heard about in the *Staying Alive* conversation. Make one move toward creating a little bit more Blue Space.

Watch

Hanns Meissner. *Creating Blue Space* (12 minutes). youtu.be/cdtLWhW3Prg

Beth Mount. *Power in the Dark*. (6 minutes) The heartbreak & structural violence that make people invisible. www.youtube.com/watch?v=Cl8fp02sfn4

Judith Snow. *On dreaming* (8 minutes). Finding connection & direction by listening deeper into "unrealistic" & "impossible" desires. <https://youtu.be/jjWT-IUHFfc>

Read

Otto Scharmer *Collective Trauma & Our Emerging Future*. Explores absencing a key idea in Theory U & a good perspective on the history of institutionalization. www.kosmosjournal.org/kj_article/collective-trauma-and-our-emerging-future/

John O'Brien *The Trouble With Person Centered Planning*. Person-centered work in life-world or system-world. inclusion.com/site/wp-content/uploads/2017/12/Trouble-with-Person-Centered-Planning.pdf

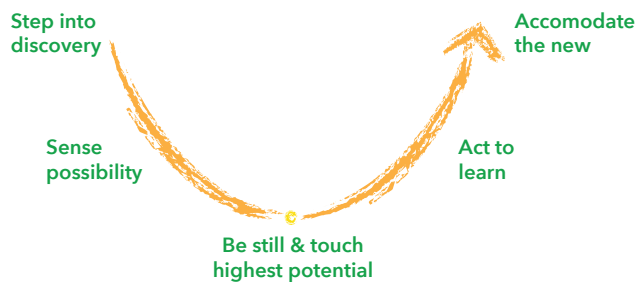
In your e-books

Blue Space: An appreciative culture Chapter 3 Pp. 33-45.

Pathfinders: Pathfinders Are Social Inventors. Chapter 5. Pp. 131-167.

DISCOVERING What more is possible

Leadership in Person-Centered Planning Session 5: Roles & Relationships that Support Choice



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Strength Together

The Community Rule* aims to increase people's choice of the supports & services they receive through the HCBS waiver.

This includes the person-centered planning process itself. The Rule opens the way to figuring out even better ways to increase people's understanding of their options & better support informed choice when it comes time to plan.

This shifts power in the planning process from experts & case managers **planning for** a person to a chosen group **planning with** them.

Meeting the challenges of this power shift means trying out different roles & practices.

*The section on the facing page quotes from the named section of The Community Rule. However any interpretation or exploration of the implications of the Rule are solely the opinions of the Learning Institute Faculty and do not reflect the positions of the NY Department of Health or the NY Alliance for Inclusion and Innovation.

CFR 441.725 Person-centered service plan

- (a) ...the person-centered planning process is driven by the individual. The process:
- (1) Includes people chosen by the individual.
 - (2) Provides necessary information and support to insure that the individual directs the process to the maximum extent possible, and is enabled to make informed choices and decisions.
 - (3) Is timely and occurs at times and locations of convenience to the individual.
 - (4) Reflects cultural considerations of the individual and is conducted by providing information in plain language and in a manner that is accessible to individuals with disabilities and persons who are limited English proficient...
 - (5) Includes strategies for solving conflict or disagreement...
 - (6) Offers choices to the individual regarding the services and supports the individual receives and from whom.

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 do our jobs.
- Our work is already as person-centered as it is possible to be.

Driven by the person

offers person choices of services & supports

enables informed choice

includes people chosen by person

times & places convenient to person

strategies to resolve conflicts

reflects cultural considerations; information is accessible

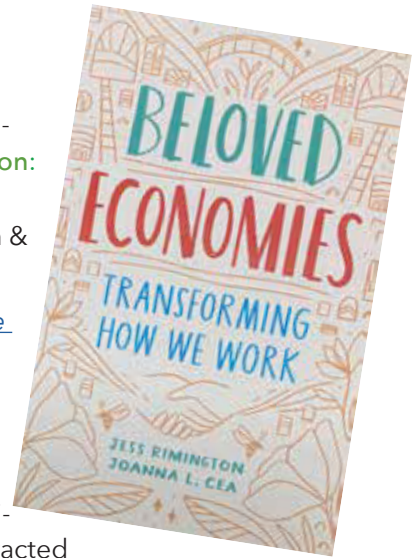
Name and describe one or more adaptive challenges you and your organization face in meeting these requirements of the Rule.

- What disagreements might there be about the meaning of the rule?
- What might be disrupted that you or your organization are attached to?
- What might be inconvenient?
- What beliefs or assumptions might you need to reconsider and revise?
- What would call for innovation: figuring out new ways to organize & conduct planning?

With a little help from our friends

For seven years Jess Rimington & Joanna Cea convened co-learners to study **breakthrough innovation**: ways of working that produce exceptional results while prioritizing well-being, meaning, connection & resilience.*

A book, [Beloved Economies: Transforming how we work](#) (2022) & a website, belovedeconomies.org describe what they are learning.

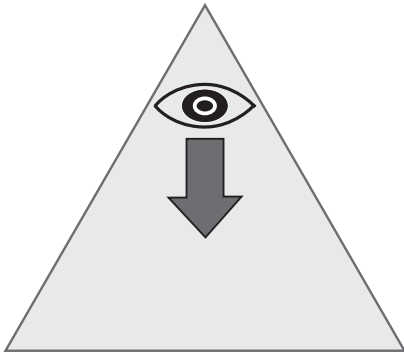


Key ideas

- Business as usual uses people up without providing for renewal. Full lives are sacrificed to efficiency & exclusion. Budgets balance on the extracted labor of families & direct support workers.
- Business as usual is not sustainable. It drains people & other resources & generates inequality. We have to change how we work.
- Broadly distributed **rights to design** are the key to breakthrough innovations that liberate us from business as usual.
- When diverse groups imagine what more is possible & act together they can change the social constructs that repeat business as usual.
- Beloved economies are already being imagined & co-created.
- Breakthrough innovators tend to follow **seven practices** (summarized on the following page).

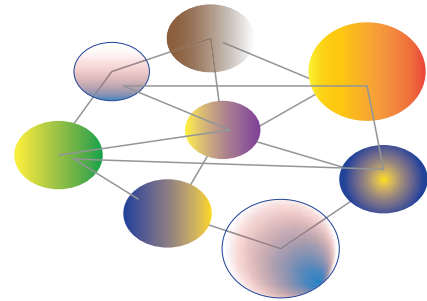
We exercise our right to design when we imagine, decide, & build together-when we hold the designer's pencil & sketch our individual & collective futures.

*Rimington & Cea's co-learning group focused on a variety of organizations responsible for innovation in a number of different fields. We see their right to design as applicable to implementing the Community Rule, reading their **right to design** as a **right to plan** and taking their seven principles as guidance for co-creating plans driven by the person.



Planned for...

- ...Experts in identifying & meeting needs.
- ...Professionals & managers who seize responsibility for health & safety.
- ...System's agents who determine what is authorized for payment.
- ...Specialists in how to plan.



Planning with people who recognize me as a whole person who...

- ...has important things to say about what I need for a good life & so do others who know me.
- ...counts on many supports to my well-being.
- ...should choose who provides the services & supports I am eligible for.
- ...can direct my plan (with accommodations).

Principles & practices

Share
decision
making
power

Trust one another.
Respect & learn from
differences. Find common
ground.

Prioritize
relationships

Dedicate time & care to
connect as human
beings.

Reckon with
history

Intentionally make time
to address the past &
the way it effects the
work now.

Seek
difference

Be purposeful in
including & learning from
diverse voices.

Source in
multiple ways
of knowing

Respect & engage
multiple ways of
knowing.

Trust there is
time

Choose to believe there is
time to build meaningful
relationships & treat one
another with care.

Prototype
early & often

Test ideas & decide
together what best next
steps to take.

441.725 Person-centered service plan

(a) ...the person-centered planning process is driven by the individual.

(2) Provides necessary information and support to insure that the individual directs the process to the maximum extent possible, and is enabled to make informed choices and decisions.

Share experiences & ideas

What works to strengthen the person's voice. How might we support people to be even more confident & influential in their planning meetings?

Pay attention to people who don't use (many) words.

Consider how people who receive services, family members & direct support workers might be involved in co-creating-improvements.

6) Offers choices to the individual regarding the services and supports the individual receives and from whom.

Share experiences & ideas

What works to make people aware of options & possibilities for supports & services & how might we expand people's options even more?

Pay attention to people who don't use (many) words.

Consider how people who receive services, family members & direct support workers might be involved in co-creating-improvements.

(4) Reflects cultural considerations of the individual...

In conversation share experiences & ideas

What works to welcome cultural differences as an important asset in planning & how might we become even more culturally competent?

Pay attention to people who don't use (many) words.

Consider how people who receive services, family members & direct support workers might be involved in co-creating-improvements.

The Case Clinic guides a small team to gain a deeper understanding of a complex or stuck situation, engaging different ways of knowing.

It would work well to explore how you might strengthen people's voice & influence through person-centered planning. Try the process by setting aside an hour and following the instructions on page 14.

Case Clinic

See a challenge
with fresh eyes

A **Case Clinic** accesses the wisdom & experience of 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

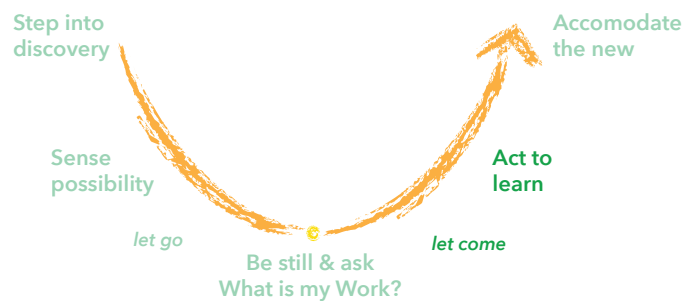
Journal on the Case Clinic

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

DISCOVERING What more is possible

Leadership in Person-Centered Planning **Session 6: Crystallize & Just Start**

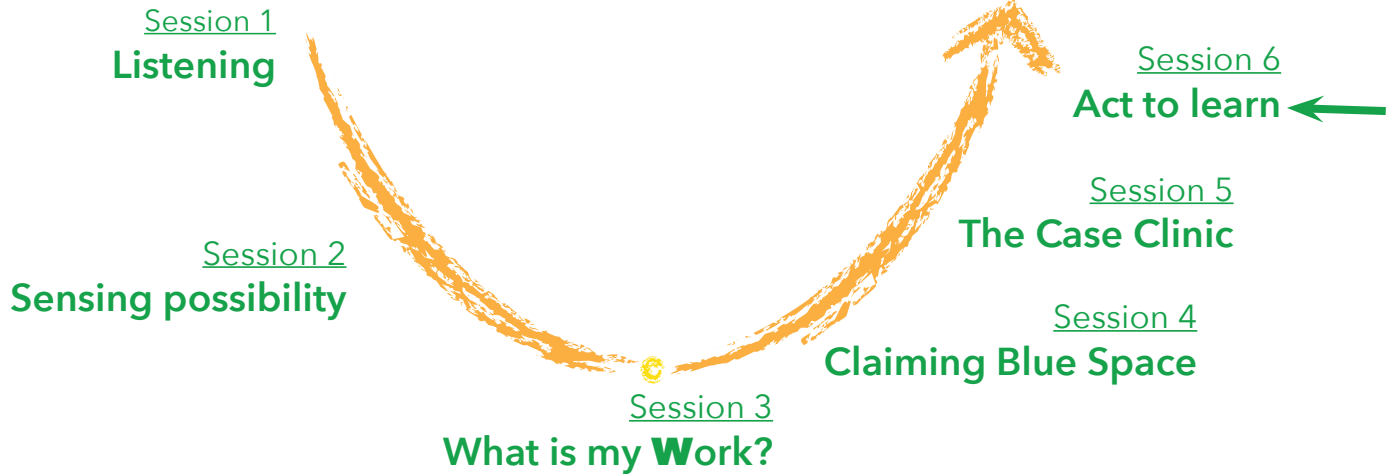
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What has become possible?	9
Looking further	10



NEW YORK
ALLIANCE FOR
INCLUSION & INNOVATION
Strength Together

Learning Institute Course Map

To increase our ability to practice leadership in **discovering what more is possible** for people we support & for our organization.



Just start...

When we listen deeply to people who count on our support, we discover desire for more of a good community life. When we act together to cross the boundaries drawn by social exclusion we can encounter 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 discovery can grow.

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

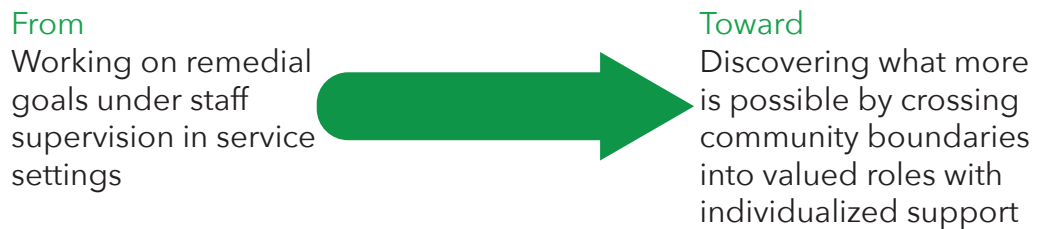
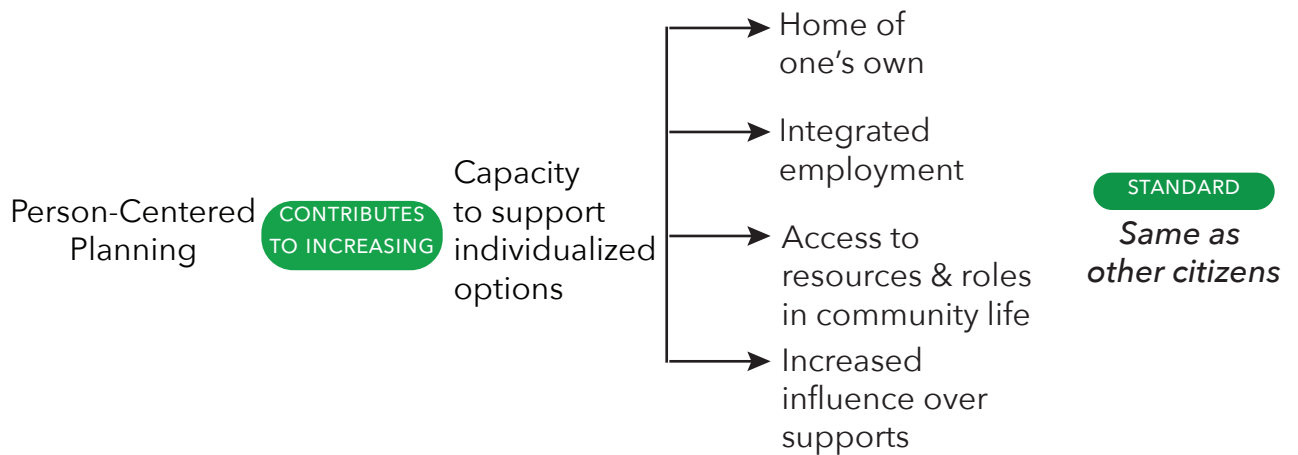


...by taking small steps...

Until an organization commits to transformation-directing as much energy as possible to individualized support for people living in their own homes, working in integrated jobs, & participating in community life-change makers take small steps in the right direction.

- **Encourage listening** across boundaries with open mind, open heart, & open will. This is especially effective among people who are not usually in contact. Imagine a Dialogue Walk that brought together a Chief Financial Officer & a group home resident active in self-advocacy.
- **Widen the horizon** of possibility & raise expectations. Imagine arranging Learning Journeys to organizations further along the way to providing individualized supports & community building efforts outside the field of long-term care.
- **Create Blue Space** among a (small) group of people interested in change to identify & reflect on their best possible response to current challenges. Imagine exploring the values at stake in organizational decisions, mapping the current balance of care & support taking positive next steps.
- **Engage Theory U practices** to build experience with Awareness Based Collective Action. Imagine practicing Stakeholder Interviews with family members or using the Case Clinic to generate new perspective on a stuck situation.
- **Enrich the person-centered planning process.** Increase attention to developing community roles that match individual gifts & interests. Imagine creating artifacts to represent what matters to a person.
- **Negotiate the resources to transform** supports for a few people who are strongly interested in change. Imagine supporting people to overcome limiting assessments of their ability to do an integrated job or thrive with support in their own home.

...toward transformation.



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 **W**ork.

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 & mind knows 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 & what wants to emerge next. It asks you to let go of thinking up a plan & 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 & 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 & 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 & 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 & 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 use materials at hand to express your situation & 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*. www.youtube.com/watch?v=mgPpphiLKS0 .

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

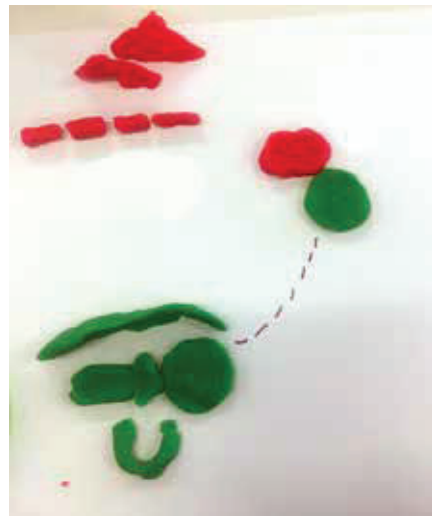
Sculpture I Now



Sculpture II Next



Beth Mount's stories about these sculptures are at www.youtube.com/watch?v=mgP-phhLKS0&feature=emb_logo



Just Start

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

1: Form intention based on what you currently know about achieving 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.

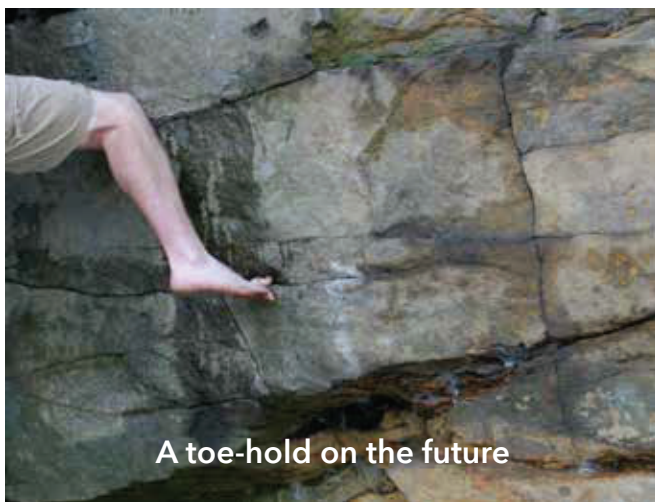
2: Find an opening. This is the space where the seed can find just enough of what it needs to grow. Sometimes openings are spacious & generously resourced but often they will be more like cracks in the pavement.

3. Act quickly with what you have. It's easy to think you have to have a detailed plan, a complete supply of resources & wide buy-in & authority before you shift into action. But meaningful action can emerge from redirecting the time & 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 & 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 & expands, you meet more people who can contribute (or block). Invite them into the next action cycle.



A toe-hold on the future

* 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 & 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 & 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 your 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:

Looking further

Practice

Follow through on the decision you made about taking a next step.

The Learning Institute offers additional sessions that support changing organizations to make more room for person-centered work. Contact [Carol Napierski](#) at the New York Alliance for Inclusion & Innovation to discuss the possibilities.

To preview the Learning Institute approach to transformational change

Watch

John O'Brien & Christopher Liuzzo (2021). Seeking Transformation (8 min). www.youtube.com/watch?v=eTp_J7RTSBU&t=8s

Read

In your e-books

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