

RHODE ISLAND FACILITATORS FORUM

Organisation for Economic Reflections on Recent Experiences in Building the Numbers and Capacities of Facilitators

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(This shorter edit of Jo's article is part Inclusion Press' book: *Implementing Person Centered Planning: Voices of Experience*)
How can we expand the number of people who are competent in facilitating conversations that support better lives for individuals, more competent organizations, and richer community life?

What will it take for these facilitators to reflect and learn together, over time, in a way that nurtures a community of learning about the art and practice of facilitation?

These were questions that Rhode Islanders asked in response to finding themselves in an all too familiar situation. In spite of investment over the years in person-centered planning, families and agency staff expressed the desire to have more people to turn to in confidence to facilitate planning conversations.

This chapter tells the story of Rhode Island's journey from few facilitators to the formation of a network -The Facilitators Forum- that supports a diverse group of facilitators to grow in the art and practice of facilitation.

This article is written from the perspective of someone who is both an "insider" and an "outsider/consultant". I lived in the Biggest Little State in the Union from 1982-1991. During that time I became actively engaged, along with many others, in understanding the service accomplishments, normalization and social role valorization, and approaches to person-centered planning. During that decade of the 1980's there were many informal leaders (parents and mid-level agency staff) who became committed to planning with individuals and organizations based on these shared values.

Central for many of us during this time was the creation of a local network of the informal leaders. This informal network -called the Service Quality Network- came together monthly over a period of many years to share stories, celebrate successes, and plan and deliver training that served to deepen our collective understanding around these principles and values. As convener of this Network, I was able to witness the many ways in which participants became a

community of learners who turned to one another to find ways to enhance the quality of individual and organizational life.

Over time, these informal leaders of the 1980's moved into formal positions of agency leadership, and I moved on to live elsewhere. As a result, many people with the capacity and desire to facilitate individual and agency planning sessions no longer had the time or opportunities to do so. Although I was often invited back to Rhode Island to facilitate planning conversations around complex situations, the network of those available to lead planning conversations diminished over time. The need to expand the number of local, competent facilitators became clear.

We knew from experience that simply training more people to become facilitators was unsatisfactory as a stand-alone response. More training usually led to short term increases in activity and interest in facilitation, but many who experienced the training as meaningful did not feel competent or ready to facilitate. And even in those situations where additional training led to an increase in the number of facilitators within an agency (at least for a while) it usually did not expand the opportunities for people to think together across agencies. Clearly a richer response to this challenge was in order.

As we faced the challenges posed in the questions that open this chapter, we found ourselves returning to our experiences with the Service Quality Network and recalling the beliefs that had served us well in the past:

- We have tremendous capacity and we must find ways to bring it forward.**
- We learn and grow over time and in community with others who share common hopes and concerns.**
- We must turn to one another. We must create a community of facilitators that turns to one another across typical agency boundaries.**
- Competence in facilitation requires naming and nurturing our shared values. We must become clear about who we are and what we believe in, as well as what we do. Gathering with trusted others is a powerful way to expand our understanding of who we are and what we believe in.**

These convictions led Rhode Islanders to respond with the creation of the Facilitators Forum.* Over the past three years, a group of about thirty facilitators has been gathering on a regular basis. This

network - a community of learners - supports one another in growing in the art and practice of facilitation. My contribution to this unfolding story, as an insider/outside consultant, has been in the facilitation of the initial two-day retreat that launched this Forum and in leading many of the almost bi-monthly sessions that have followed. I worked with a core group of local leaders -most with roots in the Service Quality Network- who shared the many responsibilities of arranging the logistics and hosting the sessions, inviting people to attend, and spreading the word of the significance of this effort. The sharing of this story will reveal some of the insights and learning that are emerging from this experience.

The invitation: Talking the walk and other lessons

Reflection on three years of investment in the Facilitators Forum offers some clarity of hindsight about the importance of the invitation to join the Forum. Since few people thought of themselves as facilitators, it was important to tell the story of "who should come" in ways that expanded the possibilities. Creating thoughtful and powerful invitations became central to early success.

From the beginning, two types of invitations have been issued. Written invitations are created for each event. These are often colorful and intriguing, clearly suggesting "this is different".

In addition, those organizing the Forum often make powerful, personal invitations to potential members. These happen through phone calls, e-mails, and personal conversations. The gist of these informal, personal invitations is "This is for YOU. This is connected to the work you do, or want to do. This could help you, and you could contribute as well."

These are some of the emerging lessons about the elements of powerful and successful invitations:

- Keeping the threshold low. All that is required for entry and acceptance into the group is interest and curiosity. Welcoming and exploring interest and curiosity become the way into deeper understanding of capacity and contribution. This has contributed to regular participation by a wide-range of people, including professional and support staff from service provider and advocacy organizations, State Division staff, parents of people with disabilities, and people receiving services.**

- Clearing the Way. The original conveners of the Facilitators Forum included a small group of leaders from three agencies: The Rhode Island Division of Developmental Disabilities, Parents for Alternate Living (an advocacy organization of families and self advocates), and**

OSARR (Ocean State Association of Residential Resources). In addition to holding leadership positions in these agencies, the conveners are in close contact with those who provide and receive service. From the start, these conveners have used their contacts to clear the way for people to attend. They are able to use their daily work to notice those who might benefit from and contribute to the Forum. They use their influence with agency leaders to say, "I was just in a meeting with one of your home managers. She was helpful in moving the conversation in a constructive direction. I think she would contribute to and benefit from our Facilitators Forum. Do you think that would be a good investment of her time? Good. I'll tell her we talked."

· Talking the Walk. The cliché advice to "walk the talk" is sometimes used to express the notion that people simply need to act on what they say they believe. Those organizing the Forum found this admonishment severely lacking (Senge, 2001). In contrast, as the organizers issue personal invitations to the Facilitators Forum they stand this familiar cliché on its head. They ask potential Forum members:

Where have you been walking?

Where does your daily journey (as a staff, parent, or person experiencing life with a disability) take you?

What have you been talking about as you walk through your day?

As people describe their daily journeys and conversations, we have opportunities to listen for ways to connect their every day work and lives to the content of the Facilitators Forum.

· "Quality Conversations". Attracting only those who saw themselves as "facilitators" would have meant a certain death for the Facilitators Forum. It would have ignored the many staff, advocates, family members, and people receiving services who encourage positive change through the conversations they have each day. The initial success of the Forum was due, in part, to finding ways to highlight and honor the many ways that participants are in conversation about the future of a person, an organization, or community. Discovering and practicing more meaningful ways to be in conversation expands both the number of individuals attracted to the Forum and the helpfulness of the Forum in people's everyday lives. The reflections of one participant capture this:

It's more manageable for me if I think of this work as helping to lead more constructive conversations. It feels more accessible, more natural. I think these skills we learn are very important. However, if I concentrate on those too much, I feel too mechanical.

Remembering that it's a conversation helps bring this into balance.

· Bridging and Building on other events: Some people are attracted to the Facilitators Forum because of their experiences with other training and learning opportunities. At the close of a local three- day course on PATH and Creative Facilitation, for example, participants heard this invitation: "If this course was helpful to you, please join a group of people who meet regularly to learn together about facilitation and quality conversations. If you are afraid to take the next step with PATH, you are especially welcome!"

For others, participation in the Facilitators Forum has been the springboard for involvement in training opportunities that they might not have otherwise experienced. Because of connections made through the Forum, several people participated in the Design for Change Course offered by John O'Brien and Jack Pearpoint. These members have since taken leadership roles in sharing their insights and learning with the other members of the Forum.

Creating a learning community during the Forum gatherings

In its short, three- year life, the Facilitators Forum has become a source of inspiration, learning, and renewal. Participants often use the word "connection" to describe a critical aspect of the experience. This connection exists during the gatherings, and sustains itself between gatherings.

Given the opportunity to reflect on this sense of connection, participants often point to two seemingly irreconcilable aspects of the time spent at gatherings. One aspect is that of the "safe place":

It's a "safe harbor". I can say what I really think, and say what I don't know.

I can just show up as myself. I feel accepted for who I am.

I feel encouragement to become better. As time goes by, I notice I'm bringing more of myself into the room.

The same spark is inside everybody.

Many participants describe the "safe place" that exists concurrently with the experience of "being stretched out of my comfort zone". The stretching sometimes comes when participants try out a new skill. Sometimes participants feel stretched to think about things in a new way.

I was scared and nervous, but I felt safe. I didn't feel alone. I was with fellow journeyers. Others in the room are like threads of a parachute for me. I won't just fall. The Facilitators Forum is a place of sanctuary.

After only three years, most participants are reluctant to draw too many firm conclusions about how this can be both a safe place and one that stretches and makes one nervous. At least one participant makes the connection this way:

Perhaps it is through the experiences of stepping out of our comfort zone that we have moved to discover together this place of deep comfort and trust.

Sustaining a learning community through collaborative action

Participants today use Forum gatherings to describe an invitation or opportunity to facilitate, seek co-facilitators, ask the group for ideas, and report (most often in hilarious detail) the stories of recent facilitation experiences.

Members call on one another across typical program and agency boundaries. Those whose job or life roles had not previously included facilitation, now engage in facilitating planning conversations. A few of the many stories of collaboration and community building include:

- A woman who receives services attended a path and Creative Facilitation Course. She was invited to join the next gathering of the Facilitators Forum. She did so, and used the occasion to recruit facilitators and team members to engage with her in a planning process that focused on making some key changes in her life. She moved to a new home that better suits her interests and desires for greater independence.**
- Forum members from one agency invited members from another agency to plan and facilitate the agency annual planning event.**
- A Forum member recruited help from others to plan and facilitate a planning day for a statewide advocacy organization.**
- A Forum member invited other members to meet with her to think together about a young woman whose supporters "feel stuck". They helped script conversations and planning sessions that are helping staff better understand why the person is acting as she does.**

Emphasis today is on the action and collaboration that happens between sessions. The sessions are the "pauses between the notes" - a time for finding connections, new ideas, and new skills that contribute to richer action.

There are many factors contributing to sustaining this community.

When long-standing Forum members are asked, "What has helped this group become a community that learns together and turns to one another for support and assistance?" they often recount the story of the Sweaty Palms Pledge.

Collaboration and The Sweaty Palms Pledge

After the Forum had established a faithful group of "regulars", they created a path plan for the Facilitators Forum. Members first engaged actively and creatively in describing the "North Star" that gives meaning to their work. When the group then considered what might be "Positive and Possible" to accomplish together over the next year, one member offered:

This is how it goes for me. The phone rings and someone says, "We have this challenge, or this mess, or this opportunity, and we want you to help facilitate a planning conversation." My palms immediately start to sweat. I consider what lies I can tell to get out of the invitation.

I think that in order to be a member of this group each person ought to take an oath. We could call it "The Sweaty Palms Pledge". You swear that you will ask for help when your palms are sweating. And if you get a call from a fellow member asking for help ("Help, my palms are sweating!") you have to say "yes". You have to find a way to help.

The Sweaty Palms Oath has become a shorthand way to convey a request for help, or an invitation for collaboration. It brings into the conversation both the acknowledgement of fear and inadequacy, and the promise to ask for and offer help. Each promise fulfilled builds a stronger community of facilitators. In on-going efforts to make this Oath come alive, members have since created Sweaty Palms plays, poems, and posters.

The Future of the Facilitators Forum

The Facilitators Forum was created out of the desire to expand the numbers and capacities of individuals willing to turn to one another to facilitate planning conversations around increasingly complex challenges. The individuals who have become a part of this effort have fashioned a community of learners that supports its members to learn together over time about what we do as facilitators and who we are as people.

The future of this community relies upon the continued diligence of its founders and members to set aside time from the busy demands of daily life to sustain this effort. It requires continued attention to

attracting new and diverse participants. Members must support each other to continue to find new and richer meaning in the experience of the Forum. Most critical for future success will be the continued willingness to bring into the open the most central convictions about this work, and to find new ways to connect people around these convictions.

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