Technology of Participation (ToP)
Extended Case Study

ToP facilitation with a group of people with learning difficulties
Connect in the North, Leeds

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Introduction

ICA:UK (www.ica-uk.org.uk) is concerned with the human factor in world development - creating a humane and sustainable future for all, through partnership and participation. We work nationally and internationally to enable individuals, organisations and communities to work together to bring about positive change.

Connect in the North (CITN – www.citn.org.uk) brings together people with learning difficulties and not-for-profit organisations to improve services and opportunities for people with learning difficulties. CITN Director Cathy Wintersgill has attended a number of ICA:UK's public Technology of Participation (ToP) facilitation training courses since 2003, and has used elements of the approach in her work within CITN and with client organisations as well.

After attending our ToP Participatory Strategic Planning course in May, Cathy expressed an interest in contracting me to apply elements of this method to CITN's upcoming "Big Meeting", an annual event for the organisation to listen to the views of people with learning difficulties and update its business plan. She had not before attempted to facilitate a full ToP Consensus Workshop[1] with a group of people with learning difficulties, however, and was concerned that some of those attending the Big Meeting might find the clustering of ideas and naming of clusters difficult and boring, and so disengage. Although I did not have prior experience of facilitating groups of people with learning difficulties, my experience generally has been that the methodology is sufficiently robust but flexible to be applied successfully with virtually any group. So, to help to assess what sort of approach would be appropriate, I offered to do a little research to explore the experience of other facilitators who have facilitated such groups, using both ToP methods and other approaches.

The research

I emailed a brief query to four online facilitation discussion groups, and within 10 days had received 22 responses totalling 17 pages and a wealth of experience and insight (full document available on request). The four groups were ICA:UK's own ToP Associates network, the global ICA ToP trainers network, the Group Facilitation discussion group of the International Association of Facilitators (www.iaf-world.org) and the UK Community Participation Network[2]. My request was for respondents to share any experience of facilitating groups with people with learning difficulties that might point to any potential issues, and to share any particular hints & tips for success.

"concerned with the human factor in world development"

The six key insights that I was able to discern from the responses received follow here, each illustrated by a few extracts edited from the words of some of the respondents themselves:

1. *collaborate with members of the group (and others with experience of working with them) to design & facilitate a process that will work for them*
   - *Jim Wiegel* - ask some of the participants what will make it go well - I bet they know a lot about how they participate most effectively.
   - *Hildy Gottlieb[3]* - I'm glad you mentioned this, Jim. We were recently working with a group for whom we were going to be doing a 3-day planning session - very intense. My contact in the group told me relatively early in the process that he has Attention Deficit Disorder and to please factor that into the facilitation plans. My response to him was that he and I would design the process together, that he should tell me what worked for him, what didn't. I told him that even during the actual facilitation, if I was losing him, to let me know and we would make it work, because his input was invaluable in getting the work done. The result was nothing I could codify and say, "Here's the answer for when you are designing around someone with Attention Deficit Disorder", but I do know he had 3 of the best days of his life - the work was energizing, he was participating and attentive, and truly it was 3 very inspired days.

2. *adapt/slow the pace*
   - *Loretta Donovan* - keep in mind that the attention span of a fully-abled adult is about 20 minutes. If you pace the various activities into 15 minute chunks and allow for frequent short breaks, it will help you as facilitator to know that your meeting is moving forward and help the participants to maintain their energy and attention.
   - *Marion Conway[4]* - The discussion may be more round about and sometimes seem off topic. Don't be too anxious to get to the point as some people may be processing things at a different rate *and* in a different way.
   - *Lynne Richardson* - Retention is often a problem, so repeating and regular summaries can help. People are often fearful of failure as probably they have been seen as failures in settings, so a safe ice breaker to build confidence will help.

3. *adapt & vary the size & composition of small groups (eg: use "learning partners")*
   - *Loretta Donovan* - some adults with attention deficit disorder find the complexity of a whole group discussion overwhelming - so can you work with sub-groups when it is important to listen and give input?
   - *Holly Crane* - I was involved in a project with New Economics Foundation, facilitating varied groups with learning disabilities – we did about 5 or 6 one and a half hour workshops on topics such as crime, etc. designed to raise awareness of democracy and give participants a voice. We used the World Cafe approach, and included a couple of facilitators per table of 3 to 5 participants where possible
   - *Edward Andersson* - It may be that it could be worth grouping people according to ability in order to ensure that everyone can have a session which caters to their strengths.

4. *use (& allow use of) words, symbols, images, colours etc. with care & creativity to hold meaning*
   - *Jan Lelie* - Meaning is the result of process ('Gestalt') and resides not in the words, but in the heads of people who engaged in the clustering. Language is just an instrument - a kind of specialized tool - for meaning. Meaning can be found in everything: moving, drawing, talking, engaging, watching … Even people who cannot read or write can participate in clustering ideas and more often than not are better in calling the names than the people

who wrote the ideas, because they have developed a coping mechanism that doesn't rely on written language. I always take pictures of the people clustering the ideas, knowing that when they see themselves clustering again, the meaning comes back to them.

- *Vikki Hilton* - use visual methods which are very engaging and enable a wide range of people to have a say. I use this approach with large organisational change processes as well as non-literate communities. Having a graphic facilitator might also be a brilliant way of "capturing" the conversations.
- *Stephen Cox* - I work with the Cowal Community Care Forum as cartoonist. We employ a system of icon communication which accompanies text using clip art, webdings or my graphic skills. Using already established templates as on the site Symbolworld is great but does not always allow people to discuss or raise more subtle subjects or feelings. At each meeting I *draw* the minutes and accompany any presentation with either pre-drawn or instant images.
- *Kathy Mackintosh* - my daughter prefers when we use different coloured cards to post items, as that provides an additional clue if she's looking for an item she has heard before. It helps me, too!
- *Ross Grant* - I did a consultation with young people with learning and cognitive disabilities in Trafford. We did that using mainly pictures, and using words only where they preferred it (depending also on level of disability). There's a document obtainable from MENCAP called Am I Making Myself Clear - guidelines for accessible writing for people with learning disabilities

5. ***allow & encourage people to relate ideas, and form & name clusters, in whatever ways are meaningful to them***
   - *Jo Nelson* - The clustering of ideas changes depending on how the group sees patterns. That's part of its beauty - it allows the group to build its own patterns of similarity using the processing styles of the participants. When I work with engineers or doctors or computer folks, they often depend on very rational connections, seeing logical categories. Other groups see different connections, sometimes more intuitively. I personally find it really interesting to see how a group is going to create a "gestalt" of the meaning of the cluster of individual brainstorm ideas to create their own larger answers to the focus question. I learn from their creativity every time. The naming section can also be adapted to fit different processing styles - small groups can name a cluster, or the whole group can do it together; the names can be rational, poetic, or visual images (as long as they answer the focus question and create the result the group needs). I think it is best to approach this as "different processing styles" rather than "learning difficulties", and look for the gifts in it.

6. ***show respect for people & their diversity of abilities & styles***
   - *[name withheld]* - Consider that your definition of 'engaged' may not be theirs. They may not need to be in their seat with eye contact to be listening and participating. Their style may include listening from another more comfortable location and returning when they have something to add.
   - *Hildy Gottlieb* - What I have found when working with folks who have a sense that the world doesn't see things the way they do is that they also want to know we believe in them - that we know deep inside that they absolutely have the potential to be incredible. Heck, we all want that!
   - *Marion Conway* - If you are working with learning disabled adults who are on the Board and staff you need to respect their ideas and the process they use to get there. Remember that it is all about the learning disabled people. If you approach the people with disabilities as though their approach is "less correct" in their clustering of ideas they will disengage.

The Big Meeting

As expected, around 20 people attended the CITN Big Meeting in August, prior to the AGM which was to follow some weeks later. This included all 5 staff, most of the 9 Board members and some other members as well – both individual members and representatives of organisational members. The majority were people with learning difficulties, including some of the staff and most of the members and Board members.

I shall now describe how each of the above insights played out in both the design and the implementation of the event.

1. *collaborate with members of the group (and others with experience of working with them) to design & facilitate a process that will work for them*
Cathy & I agreed early on that I would meet with a small group before the event to hear their perspectives directly on what we should aim to achieve on the day and what sort of approach might be most effective, and also to help to build the group's commitment and sense of ownership of the approach to be taken. I met with five of the Board members (4 of whom had learning difficulties) and the 3 full-time staff. I listened to their answers to my questions and answered some questions of theirs as well, and then I was able to confirm my understanding of their aims for the day and we agreed broadly how it should be structured and the approach to be used.

In my proposal to Cathy I articulated the aims of the day as follows:
- to develop a shared big-picture understanding of the longer-term direction of the organisation, grounded in CITN's values, and it's practical implications
- to generate some clear ideas for future projects or activities that might attract external funding or otherwise generate additional income
- to involve key stakeholders, and particularly people with learning difficulties themselves, in such a way that they feel a sense of ownership of the organisation and empowerment to shape it's future

For the purposes of the meeting itself I expressed these as:

> *Why are we here? - aims of today*
> - *To build a big picture together of our future direction*
> - *To have new ideas for future activities and income*
> - *For everyone to get involved and feel that they own it*

2. *adapt/slow the pace*
Well before the design meeting it was a clear parameter that the Big Meeting would be a 'short full day', ie: around 10am-3pm, including morning & afternoon breaks and lunch. Therefore it was clear from the outset that nothing close to a full 4-workshop Participatory Strategic Planning process would be possible.

Instead, I proposed that we focus the day around a single ToP Consensus Workshop to help to meet all three aims, with the fairly general and straight-forward focus question *"What projects or activities would you like to see over the next five years?"* To ground this workshop in CITN's values and in the practical implications of the charity's current circumstances, Cathy agreed to give a 5-minute power-point presentation on the organisation's mission, values and recent & current activities; and we followed this with a 'carousel'-style participatory SWOT analysis – strengths (*"what are we good at?"*), weaknesses (*"what are we not so good at?"*), opportunities (*"what might help us?"*) and threats (*"what might be a problem for us?"*). To break the ice and warm people up to participating fully, we began with introductions, sharing hopes & fears for the day, and an energiser – working as a team to 'play' happy birthday to one of the group, as a 'human orchestra' (humming, clapping etc. or making any noise without singing or using words). We closed the day with a reflection using a set of "transport cards", with participants choosing to stand under one of 8 images representing modes of transport and describing how the day for them had been like a journey by coach, bicycle, skateboard, spaceship etc.

The process was designed on the basis of four sessions of around 45-60 minutes, each allowing about a half as long again for activities as I might typically plan for. The outline of the day I presented like this:

What we will do – today's schedule
- *Opening and introductions*
- *Context: what will affect our future - Strengths, Weaknesses, Opportunities & Threats*

Break
- *Workshop: projects and activities for the future*

Lunch
- *continued…*

Break
- *Reflect and close*

Keeping sessions short and using a variety of activities and ways of ways of working within them seemed to be enough to keep everyone engaged throughout the day. I invited people to feel free to get up and move around, or leave and come back, if they wanted to, and to a limited extent they did. To try to ensure that everyone was understanding and being understood adequately I regularly reflected back what I was hearing and asked others to do so as well, and when a question of content or clarity was raised I generally sought one or two responses from the group to satisfy it rather than try to answer it myself. The warm up exercise was well received, and generated much laughter if not much of a tune!

3. adapt & vary the size & composition of small groups (eg: use "learning partners")

About three quarters of the time overall was spent working in small groups and individually, rather than in plenary – probably more than I would typically plan for a group of such a size. There was a great diversity communication styles in the group, so I think this was important to allow everyone the time and space they needed to contribute safely and comfortably.

The group were seated at four tables of about five each throughout the day, which made for quite intimate and supportive small group working. Initially I invited participants to choose their own tables, in order that they seat themselves with others that they would be comfortable working with, although with the proviso that at each table there should be at least one person who would record the group's ideas on paper. This turned out to be no problem at all as most were keen to

participate in recording. At the beginning of the workshop session I invited 3 at each table to each move to different tables to vary the groups, but again I left it up to them to choose who would move and where to. This seemed to work well, and I was glad that I had not tried to be more prescriptive about who should work with whom.

4. use (& allow use of) words, symbols, images, colours etc. with care & creativity to hold meaning

In asking people to record I made it clear that they were welcome to do so using words, images, symbols, colours or in any other way that they found helpful.   I made a particular effort myself to use images and symbols alongside words on everything that I presented during the event, and I included plenty of photographs of both the group and their work alongside the documentation in the report of the event. I experimented for the first time with providing the tables with multi-coloured half-sheets for recording their ideas on during the workshop, and reserved white half-sheets for the cluster titles (I am in the habit of using white half-sheets for the brainstorm ideas and a single colour to differentiate titles). I provided the tables with markers of a variety of colours as well, with the additional fun of a different fruit scent to each colour!

In the event the group recorded its work largely in words, and only a few images and symbols were used – in fact some seemed to relish the challenge of demonstrating their writing skills. How far my own modest graphic facilitation skills were appreciated was not clear, but the multi-coloured half-sheets were a great success in making it easy for people to refer to ideas on the sticky wall without having read or describe them each time ("the blue card, bottom-left, goes with the top-centre cluster with the red & green cards").

5. allow & encourage people to relate ideas, and form & name clusters, in whatever ways are meaningful to them

I made explicit during the workshop that there was no right or wrong way to cluster ideas or name the clusters, but that we were looking for clusters and names that would be meaningful to the group and which would help them to make the best of the ideas they had come up with and put them into practice after the meeting. In fact many of the group took to the clustering with such enthusiasm that the plenary became quite noisy and chaotic at times – such that on several occasions I reminded people to speak one at a time, asked specifically to hear from someone who had not spoken for a while, and called for silence to allow everyone to think for a moment.

The naming of the clusters was accomplished quite easily, and much more quickly than I had anticipated – every activity up until that point had taken at least as long as I had planned for, such that I was becoming quite concerned as to whether we would be able to complete the workshop and close the day before people started leaving in their pre-booked taxis. In fact the names were proposed and agreed much more quickly that most groups I have worked with, and it became clear to me that this group really was perfectly satisfied with quick, simple and intuitive names – in contrast to many groups which can want to get the names just right, and so find it very difficult and time-consuming to agree. Far from running over time, in the end we were able to enjoy a relaxed closing reflection and finish early with 10 minutes to spare.

As usual, the original ideas, the clusters and the cluster names all clearly meant more to the participants than they did to me – which I take as a good sign in any workshop! However, I felt in no way that I would have wanted to cluster or name any differently myself, had it been my role to do so.

6. show respect for people & their diversity of abilities & styles

I hope that I did show respect for this group and its diversity of abilities & styles, as I would any group. However my experience was that I did nothing particularly different with this group in order to do so, and that nothing particularly different was required. In fact the various styles and behaviours of this group may have been sometimes more overt and less subtle than those of most groups that I work with, but they were not really so very different. The group itself was certainly no less respectful than most, on the contrary perhaps more so. One participant with physical impairments needed several minutes to communicate any verbal contributions with the help of a support worker yet, even when the group was quite boisterous, all voices fell silent and everybody waited patiently whenever he had something to contribute.

Conclusion

It is for the group themselves to judge the success or otherwise of their meeting, and of course the real test will be the extent to which it has made a difference to them and CITN in the future. However, although participants' end-of-day feedback was not recorded for lack of time, the event certainly seemed to end with a sense of excitement and satisfaction. Cathy wrote shortly afterwards, from her point of view:

> *"Thank you so much for the brilliant job you did on Friday. The day was better even than I had hoped. The level and quality of participation was very high, everyone enjoyed it and we now have a clear sense of a shared direction. The report looks absolutely excellent - thanks for putting it together so quickly."*

For myself, both the initial research and the facilitation experience have been a refreshing opportunity to test my assumptions and stretch my skills in a context that has been new to me. I found it both reassuring and gratifying that the process was received as well as it was, not least because of how little I felt I needed to tailor the ToP methodology and my own facilitation style on account of participants' learning difficulties.

I would like to thank all of those who contributed to my email research, and Cathy and everyone at Connect in the North, for making this article possible. Any errors or omissions are my own.

The author

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[1] ToP Participatory Strategic Planning is a 4-stage process, each stage involving a specially tailored ToP Consensus Workshop – for further details of each method, and to download a 2-page pdf method overview of each, visit http://www.ica-uk.org.uk/facilitation/psp.htm and http://www.ica-uk.org.uk/facilitation/gfm.htm respectively.
[2] globaltoptrainers@ica-topnet.org, ICAUKToPAssociates@yahoogroups.com, GRP-FACL@listserv.albany.edu, UKCPN@yahoogroups.com - the first two groups are closed groups, the second two are open to all
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