

The Consultation

A Guided Conversation Among Leaders in Changing Times
by Linda Cannell

Abstract:

A discussion of the consultation as a means of promoting collective inquiry toward action. The conference and consultation formats are compared. Adapted from Linda Cannell. A Guided Conversation Among Leaders in Changing Times. *Common Ground Journal*. Vol. 12 No. 1 (Spring 2015): 11-25.

Introduction

A consultation format is often chosen when issues cannot be addressed effectively through lectures or presentations; or when challenges cannot be understood without input from men and women with varied experience who represent different organizations, cultures, and/or sections of society.

How The Conference And Consultation Differ

The pervasive temptation of leaders is to make structures and systems the channels of development rather than people. If working with people, rather than managing systems, becomes the root task, then essential processes become those embedded in conversation and consultation (e.g. framing questions, discerning patterns and trends, reflecting on experience, and designing proposals for responsible action.)

An effective consultation requires significant attention to process; but more on that after a description of how a consultation differs from the conventional conference format.

1. A consultation is not a conference. In other words, the intent is not to invite “special speakers” to share their knowledge while others listen—often with little understanding of how people are listening, what they are taking away from the event, or even if they are listening! Certainly, the conference format serves some purposes well, but if the intent is to enlighten understanding, stimulate reflection on experience, and foster action/response, the consultation format is typically more effective.
2. The consultation format requires a different approach to planning. While the details of venue, accommodation and meals, technological support, promotion, and so on, are essentially the same for both the conference and consultation, consultation planning differs in some respects. To plan an effective consultation, a team typically meets every few months to discuss the overall theme, issue, or problem common to a group of people, plan ways to incorporate both men and women as discussion leaders, include diverse perspectives and cultural backgrounds, determine subject areas for focused interaction, create facilitated exercises for both large group and small group settings, design questions to prompt thought and interaction and to lead to consideration about appropriate action, discern experiences that will strengthen relationship and consequently interaction, consider areas of knowledge and/or practice where input from one or more specialists may be needed.

3. For both the conference and consultation, the venue is important. It should be accessible, with suitable tables and chairs, and equipped with all that will be needed to support the presentations, group work, and other events. However, if possible, the venue for the consultation should be larger than what is required for exhibits and seating at speakers' presentations and workshops. At a consultation, space is needed for both seating and the display of work that results from the group interactions.
4. In addition, participants need room to walk around—to interact without feeling crowded, to move from table to table as the work of the consultation requires, and space to engage the various planned exercises. Generally, a consultation will require about one-half to twice as much space than is considered suitable for a conference—depending on the activities planned and interaction expected.
5. At a conference, it is customary to organize the meetings around presentations (sometimes including workshops or “breakout” groups) and to include a number of “things to do or see while you're at the conference.”
6. At a consultation, relationships and subsequently interaction are strengthened when experiences such as observation of exemplars (sometimes external to the venue,) worship, storytelling, sharing of personal experience relative to the overall purpose, small group problem-solving, and so on, are as integral to achievement of consultation outcomes as discussion and building on the input of one or more specialists and/or scholars.
7. A well-designed conference will likely affect one's understanding of a subject and possibly lead to differences of perspective. Typically, conference organizers are more concerned with presentations than outcomes. They trust that understanding will result and that potential difference(s) will be examined responsibly.
8. A well-designed consultation will deepen understanding; but along with intellectual engagement, the planners intentionally include unstructured interpersonal time for informal conversation, as well as time within formal sessions for facilitated exercises. Such time is needed because the issue or problem of the consultation inevitably prompts differences of perspective and may cause feelings to surface. The facilitator(s) fosters dialogue and examination of attitudes and perspective, creating opportunities for all participants to learn, in a welcoming context, how to engage women and men from various cultural and organizational backgrounds. Hopefully, this engagement will result in the construction of new insights and perspectives, and proposals for responsible action.
9. Conference planners may be intentional about who is invited to participate in the events of the conference. Consultation planners often will limit the number of participants using certain criteria for attendance (e.g., by specifically inviting participants known to have experience or interest in the theme of the consultation.) The planning team also will discuss and determine criteria for those who are invited to serve as leaders of focused group interactions. In other words, a conference tends to focus on *specialist presentation* of information that may or may not be known to participants, and participants typically self-select which presentation(s) to attend; a consultation is organized to *include* the diverse experience and difference of perspective of *participants* in relation to a particular problem or issue.

Because of the pervasiveness of the conference format among academic, mission, and congregational leaders, and lack of familiarity with interactive formats, a consultation can be stereotyped as a “sharing of ignorance.” In other words, some are reluctant to spend what they consider wasted time at a gathering where the focus is not on a speaker(s) whose expertise and knowledge matches or exceeds their own. And some specialists and/or scholars will not accept an invitation to present their expertise or focused information where their input is seen (simply) to be

supportive of (or secondary to) the interaction of the participants. Further, some attendees may just want to sit and listen to a speaker.

Processes to Facilitate Interaction and Encourage Response

In *The Sociology of Philosophies: A Global Theory of Intellectual Change*,¹ Randall Collins traces the history of thought and reveals a sociology of intellectual change. He argues that the ideas we often attribute to one or a small group of individuals were in reality constructed out of the spirited interchange of ideas across wide-ranging intellectual, and often cultural, networks—a global consultation across time, if you will.

In *Turning to One Another: Simple Conversations to Restore Hope to the Future*,² Margaret Wheatley proposed a return to ancient traditions of conversation where people talk about what is important to them. Central to the process of conversation as she describes it is sharing and listening, seeking together to understand, commitment to responsible action, and reflection together on that action. Similar to what Collins discovered in his research, Wheatley notes that most of what we would consider significant events in history began with clusters of people talking. However, “conversation” in this case is more than just coffee break interaction. A critical skill of leaders is to share their perspectives clearly, but it is equally important that they listen to one another. To listen well requires the ability to frame the sort of probing questions that will help people respond with something that is worth listening to by others—in other words, something that will actually help move thought, plans, and decisions forward.

In keeping with the insights presented by Collins and Wheatley, an effective consultation will include many, if not all, of the following processes:

1. Elicit input from among those who will become participants. Invite their feedback on how the purpose was described; questions they believe are important related to that purpose; and ideas for themes for the working groups at the consultation.
2. Invite some participants to assume responsibility in areas that will have significant impact on the work of the consultation (e.g., mealtime ambiance, promotion and displays, blogging the events of each day, technological support, welcome and hospitality, worship planning and leadership, preparatory research, and so on.) Planners must maintain contact with those who accept responsibility in order to ensure integrity with the overall purpose and to be available to help.
3. Tailor-planned, facilitated exercises to both the purpose and the participants’ experience and background. For example, at a consultation involving Asian and Latino/a leaders, facilitators understood that participants would be reticent to mingle and interact. And, indeed, at the beginning of the consultation, Asian leaders congregated at some tables and Latino/a leaders sat together at other tables. The facilitator replaced the often overused “get acquainted” activities with a prepared simulation game that placed the participants in situations where they had to work together to solve a simulated but real-to-life problem. After the simulation, the table groups were mixed and remained so for the duration of the consultation.
4. Provide the work group leaders with a document that identifies 4-5 facilitated exercises and a few questions they can use, as needed. Typically, the document will be distributed in advance, but don’t expect the group leaders to read it carefully beforehand. Only as they experience some exercises at the consultation, and only as they begin to understand the

¹ Randall Collins. *The Sociology of Philosophies: A Global Theory of Intellectual Change*. (Cambridge, MA: Harvard University Press, 2000).

² Margaret Wheatley. *Turning to One Another: Simple Conversations to Restore Hope to the Future*. (San Francisco, CA: Berrett-Koehler Publishers, 2002).

particular dynamics of their group, will they see the possibilities of using an exercise or question(s) designed to further dialogue and decision-making.

5. Establish criteria for participation and identify those who meet those criteria. To avoid the tendency to simply invite those who are familiar (e.g., friends, colleagues, those from our own context and culture, well-known leaders in the particular community) ask others to suggest leaders who could contribute to and profit from the consultation.
6. Seek out some who have experience and skills in facilitation. They will either serve as consultants and trainers of others who will be the consultation facilitators; or they will serve as facilitators throughout the event. Effective facilitators know that consultation requires time to reflect, synthesize, observe, and identify patterns. They know that the participants must be encouraged to become dialogue partners and mutual decision-makers.
7. Determine what background information is needed to support collaboration and decision-making. Seek out specialists and/or scholars who will accept a supporting role. They must understand that their presentation(s) is not to be the centerpiece of the consultation. They will provide essential background in specific areas to inform interaction and proposals for action. It is important that the invited resource person(s) plans to stay for the entire consultation to respond to questions from the working groups and/or to interact informally with participants.
8. Expect a response. Therefore, plan a concluding exercise or series of questions to prompt ideas for action. Include also take-away ideas or questions for evaluation of that action. (As an example, see under “Case Examples” below.)

Potential Benefits of a Consultation Experience

Over many decades, the persisting direction of organizational theory has been toward the recognition that organizations are affected by people’s behavior, commitments, and feelings about the organization; and that organizations, in turn, affect the development of people and the ways in which they work out their vocations individually and in working teams. In any organization, fundamental tasks of leadership are to discern the capacities of people, and to foster an environment where they can test their capacities and learn. Charles Handy³ has observed that organizations typically operate on the assumption of *incompetence*. Instead of developing people, leaders seek to control; they give directives and attempt to exert power over the other. In such cases, resolution of conflict or difference is managed by memo and/or a policy statement, neither of which is developed collaboratively. When an organization functions on the assumption of *competence*, on the other hand, paying attention to the development of people and the release of creative imagination is at least possible.

As organizations confront the forces of change, many leaders recognize the necessity of providing opportunities for people to practice skills such as inquiry, collaboration, accepting and working across difference, observing patterns and trends, decision-making, and so on. Leaders build strength in organizations when they think and act developmentally—which means investing in building the capacities of colleagues and in the analysis and shaping of systems that affect them. Organizations function best when people are respected and helped to do better the sorts of things that give organizations their energy and effectiveness.

Participating in a consultation experience could foster the sort of skills that are increasingly valued in organizations. In *Getting to Maybe*,⁴ Westley et al., describe the skills of social innovators.

³ See Charles Handy. *The Hungry Spirit: Beyond Capitalism, A Quest for Purpose in the Modern World*. (New York, NY: Broadway Books, 1998).

⁴ Frances Westley, Brenda Zimmerman, and Michael Quinn Patton. *Getting to Maybe: How the World is Changed*. (Toronto, ON: Random House Canada, 2006).

Many of the skills they illustrate are important practices for members of organizations and communities committed to consultation and action. Such skills can be developed in effective consultation experiences. Some examples follow:

- Skills common to social innovators include the capacity to see patterns, big-picture thinking, and “knowing how to interpret information and convert it to knowledge you can use to move forward.”⁵
- Social innovators in complex systems recognize that the effort to create specific, measurable objectives can lead to tunnel vision. “In contrast, when astute social innovators tackle an issue or a problem, they realize that they don’t yet know enough to set specific goals or measurable targets; they also understand that different participants have different aims in the change process—and that those participants themselves should play a major role in goal setting.”⁶
- It will never be possible to have all the data necessary for a complete picture before action is taken. Similarly, evaluation is flawed when viewed as a snapshot at a point in time. Evaluation is an ongoing process and functions best when members of the organization are empowered to ask questions and suggest areas of inquiry. Teams reflective of the diversity of the organization are created to examine progress on complex issues. “[O]ngoing data collection and assessment [help] policy makers adapt their decisions and implement their principles in the face of changed conditions.”⁷

A Concluding Observation

When organizational practices are shaped by the presumed need to compete for resources, leadership behavior devolves to managing for scarcity rather than managing for opportunity. Fear drives out the possibility of creative input, alternative perspectives are limited, and new ideas, especially those from within the organization, are less welcome; innovation is stifled, and the organization becomes increasingly rigid.

In contrast, Ted Ward once asserted that the challenge of the 21st century would be for institutions to learn how to relate to and work with other institutions across human boundaries. He was correct. In “*The Necessary Revolution*,” Peter Senge states what should be obvious by now: The world is shaped by networks or webs of organizations.⁸ Participation in well-planned consultations will assist the development of the behaviors and attitudes that make significant partnerships across agencies possible. Significant partnerships will, in turn, increase the possibility that issues and challenges will be addressed effectively.

Resources to Assist Consultation Interaction

The following are not listed in any order of priority. They share fundamental qualities that are useful for consultation experiences: They recognize the importance of human engagement, listening to one another, respecting the diverse ideas and experiences of participants in the process, releasing the creativity of people, giving people a voice in development, idea sharing, and evaluating—using criteria that all have had a part in developing.

⁵ Ibid., p. 159.

⁶ Ibid., pp. 83-84.

⁷ Ibid., p. 87.

⁸ Peter Senge, Bryan Smith, Nina Kruschwitz, Joe Laur, and Sara Schley. *The Necessary Revolution: How Individuals and Corporations are Working Together to Create a Sustainable World*. (New, NY: Doubleday, 2008), p. 9-10.

Stimulating Conversation: The World Café⁹

The World Café is a hospitable space to explore questions that matter. The process encourages broad contributions from the team, connecting of diverse perspectives, listening and sharing collective discoveries with a view to responsible action. The World Café design incorporates *focused dialogue around substantive questions, shared stories, and case studies; a structured inquiry task; and one or more plenary sessions for synthesis and decision-making*. In the rounds of dialogue, ideas build on one another while participants explore questions and issues that matter to them in their life and work. Though possible outcomes are often identified, conversations are not focused, at least initially, on finding solutions. The more important outcome, and one that happens best in conversation, is to discover suitable questions to ask in relation to an issue. Though not necessary, some have found it helpful to have a presentation from a specialist/scholar prior to the three rounds of conversation. In the plenary session(s), after the rounds of conversation, connections among ideas are explored and questions are clarified. Knowledge sharing, possibilities for further inquiry, and opportunities for research and action may emerge.

Appreciative Inquiry (AI)

Rather than look for problems or weaknesses, look for what is working, or what has promise. Recognize the creative capacity of people to reflect on current realities in light of an imagined future—to capture the life-giving elements of the past to energize the present and the future. Key to AI is the formation of significant questions. Cooperrider and Whitney suggest that human systems grow in the direction of that about which they persistently ask questions.¹⁰ Therefore, inquiry is encouraged and time allowed for people to talk together and explore ideas.

Looking Differently at Our Problems

The way we talk about a problem or situation is part of the problem. Part of the solution is to talk about it differently. Name two or three of the most frequently talked about problems in relation to the theme of the consultation:

- What assumptions are present in the way the problems are discussed?
- How might we talk about these problems differently?
- In what ways does thinking differently allow us to view the situation differently?

Case Examples

Ask participants to write a brief case example that reflects the issue addressed by the consultation. Discuss the examples, looking for patterns and reflecting on action. In the process, people are often able to identify blockages. Use thought questions rather than yes/no questions. For example: What do you perceive happened in this situation? Why? How is this situation or problem similar to or different from other situations or problems? What do you want to start doing, stop doing, continue doing? What went well, what didn't work? What happened? Why? What will we do differently next time?

(Note: These questions could also be used as “take-away” ideas for evaluation of the action planned at the end of the consultation.)

⁹ See Juanita Brown with David Isaacs and the World Café Community. *The World Café: Shaping our Future Through Conversations that Matter*. (San Francisco, CA: Berrett-Koehler Publishers, 2005).

¹⁰ See David Cooperrider and Diana Whitney. *Appreciative Inquiry: A Positive Revolution in Change*. (San Francisco, CA: Berrett-Koehler Publishers, 2005); Diana Whitney and Amanda Trosten-Bloom. *The Power of Appreciative Inquiry: A Practice Guide to Positive Change*. (San Francisco, CA: Berrett-Koehler Publishers, 2003).

Concluding Options for the Consultation: Stewarding Our Conversations

- In what ways will you continue and expand the conversations that took place at the consultation? With whom? How?
- Suggest one or more concrete ideas for a partnership with (name the relevant organizations or groups.)
- How might you continue productive conversations about important matters raised in this consultation?
- How many different ways can you suggest for collaboration—how might we help?
- In what ways can ideas or findings from the consultation be disseminated in your communities? What are you willing to do to help disseminate findings—to whom and for what purpose? How might we help? Who will you contact about ideas and insights from your work at this consultation?
- What potentially fundable issue and/or project derived from the work at the consultation could you suggest?

Sharing Questions

Use one or more of the following to stimulate personal reflection:

- Tell at least one story from your ministry that illustrates questions or doubts or particular feelings about [the issue].
- Describe an event or realization related to [the issue] that stimulated your desire to pass on something of worth to others in our context.
- Tell us of a time when you were conscious of being significantly influenced by someone else in relation to [the issue].
- What support, training, or coaching in relation to [the issue] do you wish you had in the early years of your ministry?

Rank Order

Put the situations we have been discussing in order *from the least to most comfortable* for you. Explain your choices:

Private Reflection

Reflect on the following questions privately:

- How does [this issue] make me *feel*?
- What do I *think* about the basic premises behind [this issue]?
- What do my *reactions* to [this issue] tell me about myself? About others? About God?
- What, if anything, does our work on [this issue] make me want *to do*?

Following Through After Work and/or a Discussion¹¹

1. To follow through on ideas:
 - What will happen now?
 - Who is or was affected?
 - What problems could arise?
 - What are the positive and negative consequences?
 - What factors might have changed the outcome?

¹¹ Adapted from Kenneth Chuska. *Improving Classroom Questions*. (Phi Delta Kappa Educational Foundation, 1995, 2003).

2. To summarize at the end of a session:
 - What were the main points of our conversation/work?
 - What are the most important results of our session?
 - What still needs to be considered?
3. To identify examples or analogies: What else is this like?

Response After a Period of Conversation/Discussion¹²

In light of our conversations today, respond to the following questions. Use the sheets of paper and markers at your table to record your ideas:

- If there were one thing that hasn't yet been explored but is necessary in order to reach a deeper level of understanding or clarify, what would that be?
- What requires further thought before we can commit to action?
- What action(s) are we ready to take in the next 3-4 months? Describe 1-2 essential steps in relation to the action(s).
- What will require our immediate attention as we move toward our next steps?

Note-Taking Pairs

As you begin the session, ask participants to work in pairs to synthesize information from their notes and/or observations during the specialist's presentation. Alternatively, ask them to create an improved synthesized version of their individual notes.

Send-a-Problem/Question

Place a substantive question or a concisely written problem underlying [the issue] in envelopes—enough to give one envelope to each person in your work group. Provide time for each person to reflect on the question or problem, generate possible responses, and record his or her best response on a 3"x5" card and place it in the envelope. Call "time" and instruct the participants to pass their envelope to the next person. Repeat as often as needed. Participants consider the responses as they receive them and use them to refine and improve upon their original response—adding another 3"x5" card to the envelope each time. At the end of the activity, discuss the final responses and determine what might be of value to the work of the consultation.

Dear Diary, Today I . . .

Ask participants to think of an incident related to the consultation theme. They are to imagine that the incident happened that day and they are now, in the evening of that day, writing a diary entry that captures their thoughts and feelings about the incident. "Dear Diary, Today I . . ." Call "time" and invite some to read their entries, which you may or may not use as prompts for discussion.

(Tip: Avoid the tendency to fill the silence too soon. You might allow a full minute to go by before you say something like, "No one is expecting Pulitzer Prize winners, so . . ." or "If you wish to keep your diary entry private that is not a problem, but if any wish to share . . ." If no one responds, convey that that is okay, and then move on to the next thing. However, it is likely that someone will break the silence and offer to read. Acknowledge the reading with a nod, or "Thank you, anyone else . . .?" Do not launch into a speech about *your* response to the diary entry. If discussion seems warranted, facilitate it.)

¹² Adapted from the *World Café*

To Promote Critical Thinking

The following exercises are adapted from Stephen Brookfield, “*Teaching for Critical Thinking*.”

(San Francisco: Jossey-Bass, 2012):

Closing Reflection

- At what moment were you most engaged as a participant?
- At what moment were you most distanced as a participant?
- What action that anyone took in the group did you find most helpful?
- What action that anyone took in the group did you find most confusing?
- What surprised you most about the group?

Circle of Voices

In the first round, no one interrupts the speaker. Then the person to his or her left speaks for about a minute—but is required to incorporate elements of the first speaker’s comments into his or her remarks. This process continues around the circle, with every speaker responding to the immediately preceding speaker’s comments. The circle ends with the first speaker, who responds to the immediately preceding speaker’s comments as well. Following the cycle, the group can engage in open conversation—seeking clarification, asking questions, and offering additional contributions.

Structured Silence

Every 15-20 minutes call for 2-3 minutes of intentional silence—a reflective pause. Participants are asked to think quietly about one of the following questions (different questions are chosen by the facilitator for each pause):

- What was the most important point made in the last 15-20 minutes?
- What was the most puzzling or confusing point made in the last 15-20 minutes?
- What question do we most need to address in the next period of our discussion?
- What new perspective or interpretation was suggested for you in the last 15-20 minutes?
- What assumptions that you hold about this topic were confirmed in the last 15-20 minutes?
- What assumptions that you hold about this topic were challenged in the last 15-20 minutes?

Give participants 3”x5” cards to keep track of ideas or insights. Invite response before proceeding with the discussion.

The Appreciative Pause

At least once in every discussion, the facilitator calls for a pause of about 1-2 minutes. During this time the only comments allowed are from participants who acknowledge how something said by another participant contributed to their learning, whether:

- A question that was asked suggested a new way of thinking.
- A comment clarified something that until then was confusing.
- A comment opened up a new line of thought.
- A comment helped identify an assumption.
- A comment identified a gap in reasoning that needed to be addressed.
- A comment was intriguing and had not been considered before.
- A comment showed the connection between two other ideas or contributions when that connection hadn’t been clear.
- An example that was provided helped increase understanding of a difficult concept.

To Generate Multiple Perspectives

- “Let’s look at this issue and start with a different premise. For example, . . .”
- “What would this issue look like if we began from a different starting point?”
- “Try to imagine you have no experience with this matter. Where would your instinct tell you to start?”
- “Try to think of the most unlikely ways of understanding this matter—the weirder the better. What would they be?”
- “Who or what perspective is missing and what would it look like if that perspective was included?”
- “What radically different examples can you give of this theme? In what different directions could these examples take our analysis?”
- “What questions or issues have been raised for us today? What remains unresolved or contentious about this issue?”

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