



OPENTABLE[®]
RELATIONSHIP TRANSFORMS COMMUNITIES™



Virtual Open Table

**John VanDenBerg, Ph.D.
and Jon Katov, CEO, The Open Table**

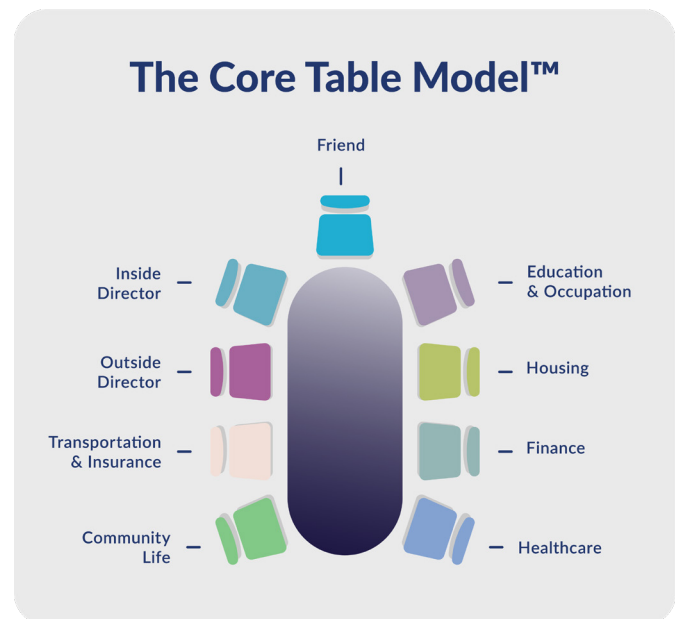
Open Table would like to acknowledge the Virginia Department of Behavioral Health and Developmental Services and the Statewide System of Care, funded by SAMHSA, for their inspiration, encouragement and support of Open Table as a team-based model.

Open Table, Inc.
7000 N. 16th St., Suite 120-238
Phoenix, AZ 85020
info@theopentable.org | www.theopentable.org
Open Table Is a 501(C)(3) Non-Profit Organization

© The Open Table, Inc., 2020-2022

Introduction

Now in over 28 states, the Open Table model is used to address the needs of persons with complex needs -- transitionage young adults, persons with mental illness, those re-entering society from incarceration, and families involved with child welfare, juvenile justice, specialized education, and other areas of need. Open Table involves six to twelve individuals — Table size can be individualized to the needs of the individual or family — from the community who are trained to be in direct relationship with the person with complex needs. The person supported is referred to as a “Friend” and the volunteers are called Table members. The “Table” makes a long-term commitment to do whatever it takes to support a healthy transition that is based on the Friend’s immediate and long-term definitions of their own needs. The Table is guided by a life plan that reflects the goals of the Friend, along with Table assistance in clarifying approaches. Table members access their social capital to connect supports that empower the LifePlan. Tables are sponsored by many different organizations, including health care companies, businesses, universities and high schools, faith communities, government and local non-profits.

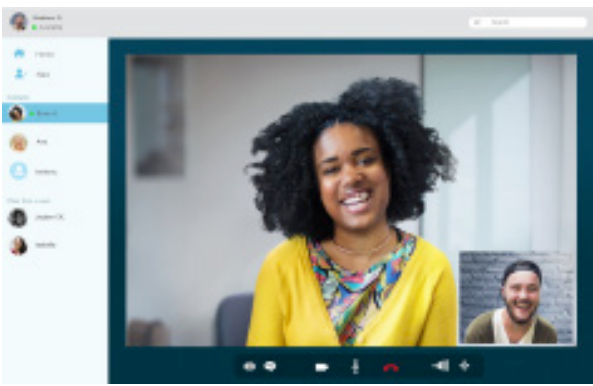


When the COVID-19 virus appeared and was determined to be highly contagious, Open Table leadership and many implementers of the Open Table model and community system of care leaders began discussions about what could be done to continue supports. Over the last 24 months, Open Table leadership had begun to use virtual technologies for training, technical support and model evaluation. The current coronavirus crisis has accelerated this shift.

Open Table is in the process of creating a version of on-line training and resources to be compatible with virtual models of training — including training for Mission Leaders, Community Engagement Coordinators, Table Members and Referral Partners. While this work will be available soon, Open Table is providing technical support to take planning steps with licensed organizations that want to make the shift to virtual Tables. The traditional Open Table training as well as the virtual versions will always be available to licensed organizations. Both training systems will be housed on the Open Table University platform.

The option of beyond face-to-face contact. There have been thousands of individuals and families who have gone through the Open Table model processes. At the heart of each Open Table is a group of persons physically coming together with the Friend with needs, and then having face-to-face meetings on a scheduled basis. Clearly, in a time of limiting social contact due to COVID-19, this level of face time will be questioned and even discouraged. In a time of government and common-sense prohibiting groups of people being together, we need rapid implementation of virtual technologies.

Why we know a virtual approach can work! The field of distance learning (also called remote learning) was first developed over 165 years ago as a way of increasing the number of individuals trained to do shorthand. We now have numerous apps available to us to assist with virtual communication. Open Table's initial work in virtual implementation of the model over the last 24 months is proving that virtual support of Tables can be highly successful.



Research on challenges and strengths of distance learning and virtual technologies.

There have been numerous studies on the effects of distance learning and use of virtual technologies. This research identified challenges and strengths associated with distance learning and virtual technologies.

Some of the challenges with distance learning/virtual technologies, specific to Open Table, include:

- It is harder to do initial engagement of persons with complex needs. Many persons who are starting the Open Table process are vulnerable and even scared of what is happening in their lives.
- It can be harder to ensure strong group cohesion.
- There is a need for strong facilitation to ensure individual Table members participate. Tables depend on efficient meetings and processes.
- Technology scares many people, or they don't have access to technologies.
- Individual Table members may feel more comfortable not volunteering for individual tasks. Open Table depends on Table members stepping forward and giving of their own relational and social capital.

Some of the strengths of distance learning/virtual technologies, specific to Open Table, include:

- Having better access due to efficiency.
- Scale: increasing the number of persons served as a result of having a more efficient process.
- Lower costs due to reduced travel and meeting arrangements. Increasing the number of potential Table members willing to serve on a Table, due to more efficient use of their time.
- The need for more routinization of meeting processes, such as ground rules for meetings and methods of ensuring participation by all involved.
- Ensuring a safe place. Safety is a crucial element of the Open Table Theory of Change (see following). Friends report that they have an easier time maintaining emotional safety.
- Time management. Overall, virtual meetings save transport and other logistical time used. In addition, virtual meetings can reduce distractions and help keep the group on task.
- Technology is better than ever. For example, few persons under 35 years of age are afraid of Facetime! The prices of assistive devices such as tablets are more reasonable than ever and are widely available for donation. For example, a faith community implementing Open Table recently did an inventory of available “retired and replaced” tablets and quickly had dozens of devices which could be donated.

The Open Table Theory of Change and virtual implementation of the model.

A theory of change describes the crucial non-negotiables of a model. In the Open Table Theory of Change, these five elements must be considered as virtual implementation proceeds.

1. Relationship: Open Table is about members of a community being in direct relationship with individuals, referred in the Open Table model as a Friend, experiencing economic and/or relationship poverty. The relationships between Table members and their Friend are at the heart of the effectiveness of the model, and the ability of the Friend to establish long lasting relationships with their Table members, and with other members of the community, is crucial to the Table achieving positive outcomes. Relationships can be nurtured virtually, using technology such as FaceTime.
2. A Shared Purpose: Through a shared purpose, members of a community have accountability and responsibility for the relationship with their Friend and build a powerful understanding of the human potential of individuals. Through the expression and deepening of their individual perspectives, Table members and their Friend affirm and deepen their own sense of wholeness, and of their connected humanity and shared purpose on the Table. During virtual contacts, the Table confirms and affirms their deep sense of share purpose.
3. A Safe Place: A community creates Tables as a way of understanding that community and personal judgment may have contributed to economic or relationship poverty. We have to create a safe place for members of a community and Tables to recognize that economic and/or relationship poverty is not about character, but rather about experience. Virtual Table and Friend contact helps further ensure safety by use of strong facilitation.
4. Transformation and Reconciliation: Transformation occurs when a community is released from preconceived notions of poverty, people experiencing economic and/or relationship poverty, and poverty solutions, including transaction-based interventions. We understand the mutuality which is built through being in direct, face to face, and long-term relationship with those experiencing economic and/or relationship poverty. We are finding that virtual contact can still make transformation occur.

5. **Local Determination and Ownership:** The Open Table model provides a foundational, consistent, tested, and proven process for addressing poverty, and provides training for communities. However -- exactly how the community of business, non-profits, government and faith sectors forms into a local movement, how expansion, focus on populations, and how the effort and scope proceeds are all locally determined and managed as part of a community's vision of their network of support under a shared purpose. All sectors of the community are embracing virtual methods of contact, and Open Table is helping lead the way. Each of these studies included TAY as well as other age populations. Currently, Open Table is conducting research to examine the dynamic of life transformation of both Friends and the Table members. Early results indicate that reciprocity between the Friend and the Table members is very real – the model in no way is a traditional “helper-helpee” process – both the Friend and the Table experience mutual benefit that lasts over time.

Open Table model facilitation. Open Table involves use of persons who are trained to facilitate the model, called Mission Leader and Inside Director (or Mission Team). At times, Friends learn to facilitate their own Tables. Facilitators learn Table-support skills and how to efficiently use the process. Open Table trains the Mission Team and Table at the same time through on-line training developed through the Open Table University™. This training is currently being updated to include virtual options and video examples.

Engagement challenges. Initial engagement of individuals and families with complex needs is very important to eventual outcomes. There are many core engagement skills involved with implementation of the Open Table model. These skills involve body language, watching Friend and Table member reactions, emotional re-assurance, and dozens of techniques coming together to help a Friend begin their journey in getting support.



Can engagement be done virtually? Absolutely. Here are some defined skills and steps:

- **First contact.** The first meetings of Open Table can be done virtually for many persons/families. The Mission Team would make numerous advance phone contacts. On these calls, they would have “get to know you” time and share information about the Table-based planning process. The Mission Team would disclose details about their own lives and roles. In the old days, we were trained not to share details about ourselves, but although following good boundaries is important, no one would want to trust someone whom they do not know. In the Open Table model, this mutual disclosure has been proven to produce Tables which continue to provide support long after formal graduation from the model.

Depending on the type of Table-based planning, the Open Table Mission Team would answer questions, do initial assessment of immediate risks, and ask the person or family about their preferences. In addition, during this meeting, the Mission Team would assess the Friend's access and skills in using communication technology. A range of options for Table communication are introduced and initial choices are made by the Friend and their family.

During the first contact meeting, the person facilitating the process would brief the Friend on the individual Table planning process and begin to form a relationship which can be used to ensure a strong virtual Table planning process.

- During this first contact, the Mission Team should ask the Friend about their preferences for Table communication. A wide range of potential options are available to meet chosen preferences.
- Ask the Friend about their communication preferences. Some Friends who are very leery of technology may choose to use phone calls only or choose to start with phone and add a visual option such as Facetime at a later time. The Mission Team can brainstorm with the Friend about their preferences regarding acquisition of skills in virtual communications such as FaceTime, Zoom, Hangout, or other methods.
- Other Friends may not have any smart devices or computers or know how to use them. In these cases, assuming the person agrees, a Table member can mentor the Friend on getting the devices donated. Ideally, an organization implementing Open Table will keep a supply of "loaner" devices.
- **Friend preferences about meeting management.** During first contacts, the Mission Team can ask Friends to share their preferences for how meetings are managed. Some Friends involved in Open Table who have been in human services have experienced dozens of meetings, involving "the good, the bad, and the ugly" of meeting processes and outcomes. The Friend needs to understand that this meeting is based on their preferences about how meetings should proceed. For example, the Mission Team can introduce the topic of ground rules and Friend preferences about ground rules. A common ground rule in virtual planning is to ask the Table members to be mentally present and involved, vs. being on their phones or doing other tasks during the meeting. A Friend may want one person to talk at a time or want initial meetings to include tight time schedules.
- Technology for virtual meetings. All subsequent Table meetings would be done using remote meetings apps and technology (ZOOM, Facetime, Google Hangout, etc.). It is essential when using these technologies or remote meeting apps for the Mission Leader and Inside Director to have the skills of using the preferred method. We have all been on planned calls that aborted when the technology either failed or was not understood by the facilitator, or when the Friend was not prepared to use the technology.



Larger sites with many Friends involved with Tables may consider having a technology preparation specialist who mentors and oversees the process of preparing the Friend and the Table for using the chosen technology.

Ground rules. The Friend should be asked about their preferences for ground rules for the Table. In virtual Tables, the need for ground rules may be greater than in the in-person Tables as group dynamics will not always serve to regulate Table member behaviors. In Open Table, once regular meetings begin, the Inside Director is the facilitator, along with the Friend. Common ground rules for virtual planning include:

- Table members and the Friend must commit to being present at the meetings if at all possible, and if they cannot attend the meeting, to reviewing the agenda in advance and giving their input to the Inside Director to share with the group at the appropriate time in the meeting.
- Be fully present and available for active participation – avoid other tasks, concentrate on the meeting, and avoid distractions to the Table and to themselves.
- Table members should let other Table members speak without being interrupted. Start by saying “I would like to comment,” which lets the Inside Director call on the Table member as soon as possible.
- Have a process, defined in advance, for re-joining the meeting if the Table member loses connection to the group. Most meeting technologies such as ZOOM, Google Hangouts and many others have clear procedures for this.
- Strong facilitation. In virtual meetings, an overly enthusiastic or demanding Table member can limit the effectiveness of the Table meeting. Inside Directors must exercise firm meeting management, without discouraging participation. Participation is monitored by the Inside Director. In virtual meetings, it is easy for some Table members to stay silent or simply avoid comments.
- Table members are asked to stay positive and to express concerns in a direct way without blaming or shaming the Friend or each other.
- Virtual meeting facilitation should include “going around the room” where each Table member is asked to respond to encourage participation from everyone who is present. A common method of ensuring participation is to ask Table members to text the Inside Director with questions or comments, and to text the entire Table during the meeting as needed. Some of the Table-based meeting technologies such as “Go to Meeting” have elaborate methods of capturing comments and questions.
- Tables have ground rules about maintaining confidentiality.
- Tables rely on the saying “never about us without us” as a way of ensuring that individual Table members do not discuss the Friend outside of the meetings.

Table cohesion and trust. Strong Table cohesion and trust begins with Table members and Friends learning information about each other during the “Breaking of the Bread” initial virtual meeting. This includes Table members sharing who they are, why they are helpers, when they have needed help from others, what they can offer in the areas of special skills, and their goals for being part the Table. This time is about establishing each Table member not as the savior of the downtrodden, but rather as a person who also needs and gives support. At this time, the Friend can share their own definition of their major needs. Ideally, this information is recorded and available for new Table members who may join the Table.

We recommend that the Table has a process for members who have to leave virtual meetings early. A Table member should never just disconnect from the meeting -- good meeting manners mean that the Table members try to attend all of each meeting, and then if they have to leave early, let their fellow Table members know in advance. Agendas. Almost all Table-based support meetings use detailed agendas and time-limited meetings. Agendas are even more important for virtual meetings. Inside Directors should work with the Friend to develop the agenda. **Agendas** must be shared with the Friend and Table members in advance of the meeting. Inside Directors must practice active monitoring of times used for each agenda item. Most Table-based planning methods limit meetings to an hour or less. The quickest way to derail a Table is to not follow an agenda and have meetings consistently go over the allotted time.

Evaluation of Table meeting effectiveness. Evaluation is up to each community, following the fifth element of the Theory of Change (Local Determination and Ownership). However, Open Table recommends that Table-based planning should consider incorporating methods of informal or formal evaluation of the effectiveness of meetings.

For example, an informal method may involve each Table member and the Friend giving a 1-10 rating about how the meeting went, noting strengths and what could be done to make the meeting even better next time. A more formal method of meeting effectiveness may involve a separate evaluation filled out by each Table member and the Friend and compiled by the Inside Director. These ratings can be shared in the first part of the agenda for the following meeting. With virtual meetings, meeting effectiveness evaluation is even more important than in face-to-face meetings.

Contact of Table members with Friend outside of Table meetings. For most Table-based planning, frequent yet brief phone calls, email, and texting contacts with the Friend help build the ever-essential relationships which will sustain the planning over time. Of course, the level and intensity of contact will vary based on the preferences of Friends.

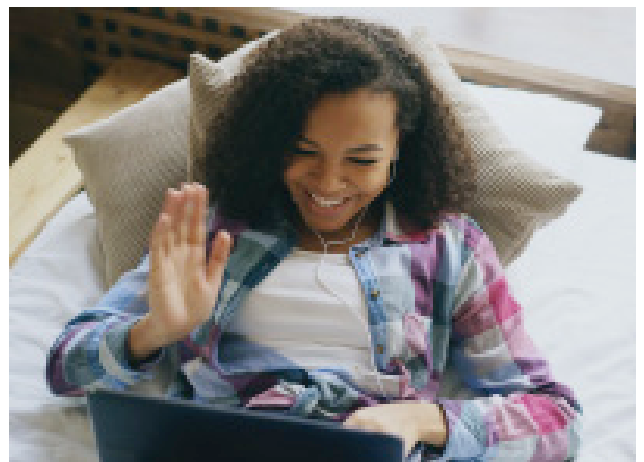
Virtual access to the Social Determinants of Health. The term “Social Determinants of Health” refers to the diverse elements that constitute good health. Kaiser Health defines these elements in six core areas: Economic Stability; Neighborhood and Physical Environment; Education; Food; Community and Social Context; and the Health Care System.

Open Table, through access to Table members’ social and relational capital, represents a unique method of accessing these diverse elements which comprise good health and therefore better lives. The current COVID-19 crisis can limit Friend access to the gateways of these determinants of health. Through virtual meetings, the Table can brainstorm and help implement access to fulfill these social determinants of health. For example, a Friend in poverty who has been experiencing homelessness may get help from a Table finding housing. This help would come from the virtual brain-storming session, with the Table members accessing their social and relational capital to help find options, all without a physical meeting.

Community Convening. Community sectors have asked Open Table to train the Open Table model within their organizations and also to develop models that would allow them to co-invest their relational and social capital in solutions to focused social challenges. These community sectors include business, education, faith communities, government, healthcare, law enforcement, legal, media and others. This process is called Community Convening and information can be accessed on the Open Table website at: www.theopentable.org.

Currently, almost all of these sectors are recognizing the need to convert their systems to maximize virtual contacts and training. Open Table calls this model Community Convening™ – an Open Table process where community sectors establish productive, mutual relationships which include virtual access to relational and social capital for community initiatives.

Open Table has developed and is now training community sectors to co-invest in shared purpose initiatives, which includes support to move to virtual models, not only for Open Table, but for other forms of team-based planning (for an overview, email Dr. VanDenBerg or visit the Open Table website at: www.theopentable.org and click on “Resources” for a PDF copy of the recent paper Virtual Technologies Work! Team-Based Supports and Planning, John VanDenBerg, 2020).



Summary. Maximizing the use of virtual meetings and support is vital to the continuing support for people with complex needs and providing access to anyone who would like to serve. This brief paper is designed to raise major issues involved with virtual meetings. We encourage each locality to bring stakeholders together to develop and further refine how virtual supports and meetings will be implemented.

Dr. VanDenBerg is one of the founders of the Wraparound Process, which is the dominant team-based planning process used in North America. He is currently retired from formal Wraparound training and is a volunteer in supporting the Open Table. His email address is jevdb1@gmail.com.

Jon Katov is the CEO of The Open Table. The Open Table began in Jon's congregation. The model is now widely used across over 28 states. His email address is jonkatov@theopentable.org.

If you have questions or comments, please contact Jon Katov.