

~ engaging people in change

Introduction

Many of the issues, challenges and opportunities facing people today cross boundaries of organisations. All too often small groups are pressed to make decisions and plan actions on behalf of the whole organisation. Then the task becomes how to communicate these decisions and enrol people in taking the actions needed.

However well intentioned the decision-making groups are they often miss the vital perspectives that will help them to make plans that balance the needs of all concerned. Even when consultation has been carried out through focus groups and surveys resistance is strong.

Through interactive, participative forms of diagnosis, planning, visioning and decision making resistance can be harness and change accelerated. In a large 'whole system' group setting:

- information will be available from all of the relevant perspectives and assumptions and stereotypes can be broken down through shared stories and collective working
- the dynamics of the whole can be observed and the trade-offs necessary understood by all
- the diverse make-up of the group supports the exploration of creative solutions and synergies and formation of networks connected across traditional boundaries
- people will support what they help to create - implementation of plans is thus faster and more efficient
- a larger number of issues and actions can be considered in parallel - in the space of a two day session you can cover the work of 100 smaller, shorter meetings
- traditional 'power' dynamics breakdown as people share responsibility for action and see each other as trustworthy and responsible

Underlying Principles, Models and Values

The practice of interactive conferences has been based on a large body of theory and experience. It brings together the work of the Tavistock Institute on group dynamics, large and small, various aspects of 'systems' theory, lessons from the New Sciences and the principles of adult learning.

Models & Theories

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|------------------------|-----------------------|
| a) Open Systems Theory | d) Preferred Futuring |
| b) Model for Change | e) Adult Learning |
| c) The New Sciences | f) Group Dynamics |



a) Opens Systems Theory

The term system comes from the Greek word 'sunistanai' which originally meant 'to cause to stand together'. To talk of a 'system' is to suggest that we mean the whole of a set of elements that work together to a common purpose. To practice systems thinking is to take a 'wide angle' view of the world and to pay attention to the whole rather than the parts, the patterns and interrelationships rather than the circumstances and events.

Open systems theory states that each action affects all else in some small way, sustaining a constant pattern of change. Therefore 'change' is seen as the primary fact of existence. If we model organisations and communities as open systems we see them as flexible, adaptive, carrying forward past histories with new efficiencies, purposeful and coping, full of creative tensions and able to generate and utilise information for feedback. Open systems thinking helps us to recognise that small things can have large effects, and that cause and effect are rarely related in time and space.

In using open systems theory as a basis for interactive conference design we ensure that participants explore

- the external environment and the factors which are affecting it
- the relationships between the external environment and the internal environment
- internal relations within the system
- the system's potential to influence it's environment

b) Formula for Change - DVFC>R

This is a formula for change that begins by acknowledging that there is often some form of resistance to change in individuals, organisations and communities running in parallel with their natural inclinations to change. Where that resistance is present it is often the case that the more we tackle the resistance directly the stronger it gets. This formula suggests that whatever the resistance it is more effective if we start on the other side of the equation and consider, for all of the various perspectives:

D issatisfaction	<ul style="list-style-type: none">• what is the dissatisfaction, where is it shared, how is it understood and experienced differently
V ision	<ul style="list-style-type: none">• what do people yearn for and aspire to, what are their common goals and desires
F irst Steps	<ul style="list-style-type: none">• what first steps could people undertake which they all agree would be moving them in the right direction
C apacity	<ul style="list-style-type: none">• what is the capacity for change in terms of time, resources, energy and capability and how can this be generated and shared

Since the equation is constructed as

$$D \times V \times F \times C > R$$

then if any of these elements is zero then the whole of the left hand side of the equation is less than the resistance. As we pay attention to exploring these elements and increase their value our likelihood of overcoming resistance is increased.



c) The New Sciences

Frederick Taylor wrote *The Principles of Scientific Management* in 1911 but his theories and methods were rooted in the scientific world of Sir Isaac Newton. These methods of organising were based in the mental model of the organisation as machine, a closed system. They measured and controlled, they studied cause and effect, they separated things into parts, they gave people roles and accountabilities and they sought the one right answer.

Today we have a range of new scientific insights to inform the way we manage and organise theories from quantum physics, self-organising systems, and chaos theory. These ask us to pay attention to participation and relationships, disequilibrium and autonomy, patterns and fractals. Meg Wheatley, who has done some wonderful work in mapping the messages of the new sciences for organisations and communities, describes 4 core lessons:

- **relationships are all there is** - none of us exists independent of our relationships with others, and since each of us is a different person in a different place, the relationships we create change the nature of our systems. We create new realities with observation, interaction and participation.
- **information forms and informs us** - information is a dynamic element which gives order, prompts growth and defines so that information organises matter into form. Information changes as it is shared and information must be continually generated to support life. If we seek out disconfirming information we grow
- **self-referencing supports change stability and renewal** - change generates energy and positive feedback and disequilibrium move a system forward. A clear sense of identity and history supports self-referencing change. With clear principles local autonomy can achieve coherence and continuity.
- **order emerges out of chaos through strange attractors** - there is order inherent in chaos and strange attractors create order through small patterns, or fractals. These can give us clues about the patterns of the whole if we relax in confusion and look for the patterns.

d) Preferred Futuring

Charles Handy has talked about this in a 'thought for today'. He was reflecting on the value of creatively reframing things so that the familiar and the problematic becomes an arena of possibility with scope for myriads of new attitudes, behaviours, actions, laws, and other energising responses.

A great deal of research has been carried out over the last three decades on the conditions that support 'positive reframing'. The work of Ron Lippert, Edward Lindeman, Robert Fritz, Warren Bennis, Victor Frankl, Ronald Fox, Eva Schindler-Rainman et al has produced an understanding of the way in which working with 'images of potential', and envisioning what could be (instead of problem solving and lamenting), can create amazing energy, enthusiasm, optimism and high commitment.

Lippert found that groups who were tasked with problem solving, no matter what variety of techniques they used, were inclined to lose energy, avoid responsibility and resort to blame. The solutions they developed were focused on reducing pain rather than resolving the issues. On the other hand groups who were invited to begin by defining what potential success would look like, given the realities of today, were inclined to gain energy, take on additional responsibility and make things happen. Their solutions tended to be innovative and identified what needed to happen based on the realities they identified, to attain the future they preferred.

Preferred Futuring	Problem Solving
An air of honesty and realism, even catharsis, created constructive dissatisfaction, replacing defeatism and blame	Blame increasing and responsibility decreased
Tremendous excitement, hope and optimism generated more co-operation and teamwork	Depression and despair increased, reducing co-operation and teamwork
More 'stretch', breakthrough and longer-range goals, and solutions were developed	Shorter-term goals focused on reducing pain or fixing surface problems/symptoms
High motivation resulted from moving towards something attractive rather than away from something painful or to be avoided	Decreased motivation resulted from generating a large, prioritised list of problems

e) Adult Learning Theory

There are many ways in which adult learning principles are integrated into this work but at the heart of it all is a commitment to develop a participant focused mind-set. Nothing is done 'to' people for their own good, or 'for' them because they are incapable. Everything is done 'with' people trusting that they are creative, trustworthy adults who will do the work that is needed.

Ten tips for good adult learning in large groups

1. Plan for conversations in self-managing small groups that treat everyone in the group as an equal contributor.
2. Ensure that there are no *negative learnings* or tests with right and wrong answers other than those people in the room put themselves to.
3. Avoid methods that will evoke a passive response and turn the participants into an audience (NB: OHP slides can do this).
4. Design information flows from individual to table to room and back so that people feel they are impacting and influencing the proceedings.
5. Explain conceptual models so that people can be wise about the work they are going to do and make decisions about how they progress it and no one is passively 'jumping through hoops'.
6. Tell good and bad news as it is - information is not avoided to protect people if it is relevant to the work
7. Progress real work that is of value to people and avoid irrelevant games.
8. Manage the energy so that people move around, work in different teams, and use varied processes. Balance talking and listening and plan activities so that people have the information they need to inform their discretion and decide for themselves.
9. Make participants responsible for their own group's facilitation, recording and report outs. Legitimise and rotate roles with instructions and guidelines.
10. Treat participants as whole people with complex needs, wants and issues they want to bring to the table.



f) Group Dynamics

Many people when they enter a large group setting become anxious. They are likely in the face of this anxiety to assume that they will not be heard, or they will be manipulated, everything will be chaotic and disorganised, nothing productive will be achieved and their issues will not be covered. This at best will evoke a passive response and at worst fight amongst sub-groups or flight as people leave or escape into other work.

There are three key dilemmas in designing large group conferences to be interactive:

<p>Voice</p> <p><i>"I have been heard and I actively share responsibility for what has happened"</i></p>	<ul style="list-style-type: none"> • Allow time for conversation so each person can speak • Use multi-voting to express individual views • Use short reports of key words to build common themes • Share responsibility for roles • Provide tea and coffee so people can take care of themselves
<p>Structure</p> <p><i>Not too much - not too little</i></p> <p><i>"I knew what I was doing and why, and it was what I needed to do"</i></p>	<ul style="list-style-type: none"> • Agendas which show purpose and key activities • Roles with tips on what the responsibilities are • Design tasks which support normal conversational processes and progress real, relevant work • Provide detailed tasks sheets for all participants with purpose, importance and key steps • Explain conceptual frameworks • Allow challenge and support all views
<p>Egocentric</p> <p><i>"I could be myself, see how I fit and a purpose and work larger than myself"</i></p>	<ul style="list-style-type: none"> • Allow people to come in and be heard as individuals • Avoid expression of individual views to the whole group without reflection and group conversation • Build the flow of work so people gain an increasingly larger picture • Work to common purpose and build a sense of consensus on some things whilst holding the differences • Sharing evaluation data

Setting up and planning an Interactive Large Group Conference

The overall process of setting up and planning an interactive large group conference can take at least 4 to 8 weeks. The overall steps are

1. **Initial entry and contracting** – To lay a solid foundation for the ongoing work in planning and delivering the work and to build relationships with the key players from within the system who will be needed to set up the conference
2. **Scoping, planning and designing** with a representative cross section of the participants - To use the stakeholder data to design the alignment process or an interactive conference which is responsive to the issues, challenges and opportunities facing the community and supports the overall purpose
3. **Meeting planning** – To set up a local person to work as logistics co-ordinator and establish a working relationship enabling them to support the work in inviting and briefing participants



before the conference, ensure all the materials and other logistics are provided to support the design created in Phase 2 and successfully plan, stage and run the logistics of the event

4. **Conference** – To leverage the opportunities for the organisation inherent in the process
5. **Follow-up** - To focus key stakeholders on the work they need to do to ensure success on the implementation of initiatives

You will usually spend more time planning interactive conferences than running them. There are some key decisions to be made and a lot of detailed planning to be undertaken to ensure the time of the large numbers of diverse people is used well.

Make up of the Planning Group

This needs to include people with:

- Experience of running interactive meetings
- Contacts to help arrange participation
- Knowledge of the issues
- Access to resources and administration facilities

It is important that they include a diverse range of perspectives on the organisation and are able to essentially be a 'microcosm' of the larger system so that some of the key issues and questions can be explored fully and a plan developed which will address the needs of all. Typically they might meet for a total of 3 days and do a lot of work by email, phone and in sub-groups.

Planning Group Process

The group needs to establish the value of each individual contribution and agree how they to work together to develop the purpose and plans for the conference.

A typical set of meetings might include:

1. A background to the initiative and the interactive approach being considered.
2. A sharing of stories to identify the stakes everyone has in the work and the contribution they would like to make
3. A continued sharing of information about the issues, challenges and opportunities within the community
4. Identification of the reasons for the conference, in particular the desired outcomes and purpose
5. Consideration of design options, generic conference designs such as future search, search, open space etc. and consideration of particular options which will help to achieve the purpose
6. Consideration of the participants, - who has information, influence, needs, issues etc.
7. Exploration of the invitations process - letters, advertising, personal approaches
8. Identification of follow-up issues and potential initiatives

It is also possible to design an interactive conference to meet the purpose expressed by the planning group. There are a number of principles that need to be considered in doing so:

<p><i>Each element must help accomplish the purpose</i></p>	<ul style="list-style-type: none"> • all activities add to participants knowledge about the system • there are no throw away sessions • information and content is planned to be timely and in the right order • changes are explained • the links, logic and flow are clear and explained • there is a sound conceptual/theoretical reason for the activity which can be easily explained
<p><i>Connection needs to happen before content</i></p>	<ul style="list-style-type: none"> • people need to connect with each other first • people need to connect to the conference purpose and what it means to them before beginning the work
<p><i>Engage the Whole Person</i></p>	<ul style="list-style-type: none"> • use sight, sound and movement • attention should be paid to what is happening to people during the process - are they standing , sitting, facing each other, moving, facing issues etc.. • the energy of the group will change and needs to be taken account of • the physical space of the room needs to be planned • how close together are people • how much room to move is there • how close are the tables - are any tables disconnected spatially • are people in circles or lines • can everyone see and hear • will music enhance the visceral experience • pay attention to caffeine and blood sugar levels
<p><i>Consider the Whole System and use Playful Construction</i></p>	<ul style="list-style-type: none"> • design activities which help people visualise and experience the system under consideration as a whole • examine the whole from many directions and angles • go from the parts to the whole and back • go from the whole to the parts and back • take things apart and put them back together • use metaphor, exaggeration and paradox
<p><i>Build and use Creative Tension</i></p>	<ul style="list-style-type: none"> • use activities to identify the tensions • explore the tension between the current state and desired future state • face and name current reality • create a picture of a positive, energising desired future • simultaneously hold an understanding of the past, present and future
<p><i>Make time and space for Reflection</i></p>	<ul style="list-style-type: none"> • use reflection as an antidote to a bias for action • reflection can aid integration and synthesis • use journaling, repetition, story telling, dialogue and feedback to reflect • build in soak time and an overnight space for thinking
<p><i>Ensure all Information and Decision Making is Public</i></p>	<ul style="list-style-type: none"> • all information should be shared • all information should be public • develop many different ways of sharing • make decisions public



Further Reading

Title	Author(s)	Publisher	ISBN Number
Future Search - An Action Guide to Finding Common Ground in Communities and Organisations	Marvin Weisbord and Sandra Janoff	Berrett Koehler	1-881052-12-5
Large Group Interventions - Engaging the Whole System for Rapid Change	Barbara Bunker & Billie T. Alban	Jossey Bass	0-7879-0324-8
Open Space Technology - A User's Guide	Harrison Owen	Abbott	0-961805-3-5
Real Time Strategic Change - How to Involve an Entire Organisation in Fast and Far Reaching Change	Robert W. Jacobs	Berrett Koehler	1-881052-45-1
Terms of Engagement – Changing the Way we Change Organisations	Richard Axelrod	Berrett Koehler	1-57675-084-1
The Search Conference - A Powerful Method for Planning Organisational and Community Action	Merrelyn Emery & Ronald Purser	Jossey Bass	0-7879-0192-X

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