

This article reports how principles and techniques of Large Group Intervention methods are used in two conferences that serve as member check in academic research. The aim of this research is to contribute to a more effective use of Large Scale Interventions (LSI) for organizational change, by developing evidence based guidelines and tools for clients, consultants and researchers of LSI.

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features

Practice what you preach: Large group conferences as member check in intervention research

Introduction

Large Group Intervention methods gained their own place in the practice of organisational change and development, as the articles on Large Group methods in *Profile* 17/2009 show. However, the authors signal that sustainable change is not to be expected from a one time and short large group event. Effective organisational change requires a good match of intervention design and performance on the one hand and circumstances and intended effects on the other. The large group meetings have to be embedded in a



Abb. 1: Practioners, clients and researchers working together in a research conference

larger process, the Large Scale Intervention (LSI). But when and how is an LSI likely to contribute to sustainable change? How do we know that time consuming involvement of stakeholders is or was worth the effort? A research project¹ of Tilburg University in the Netherlands produced an outline for a practical guide, based on systematic evaluation of reported LSIs. This guide contains guidelines and instruments to assess and discuss conditions and expectations before the start, to facilitate planning and execution during the LSI, and to evaluate effectiveness after an LSI.

Why research conferences as member check?

Member checks in qualitative research

The guide identifies success factors and effects with indicators for observable evidence. These items are derived from an extensive field study. The study includes text analyses of approximately fifty articles with reported LSIs, interviews and workshops with thirty-five stakeholders (facilitators and participants of LSI, researchers of interactive interventions), and prolonged engagement with practitioners through membership of world wide networks. Main questions asked are: What do we have to look for and what questions should we ask to find out if an LSI was effective? How does sustainable change show? From the success factors, indicators and questions an evaluation instrument is developed, comparable to commonly used audit tools in quality management. The evaluation instrument is tested in a case study with an evaluation of three past LSIs. All guidelines and tools are assembled into a prototype of a practical guide. The format of the guide is borrowed from a practical guide for a medical treatment, because medicine is a discipline with massive experience in evidence based information leaflets for clients and experts.

Input for the guide came from a lot of sources and people, but the development of the guide is done by a single researcher, applying qualitative research methods. Until then, the researcher is the only one who did the analyzing and concluding. A member check is necessary to check the credibility of research process and outcome and to enhance applicability of the guide in practice.

In qualitative research, a member check is mostly held by sending report drafts for correction to the people who were interviewed for the research project, or by organizing a meeting with key players to discuss and correct the report. Sometimes »laymen« are involved to get more insight in the view of ordinary people, in order to enhance the usability of research outcomes. For instance, in health care research »consensus conferences« are used. In a consensus conference a panel of lay people discusses the outcomes with experts until they reach consensus, registered in a consensus statement.

For several reasons a regular member check seemed not appropriate for the research project on effective use of LSI. First of all, a large number of stakeholders, practioners, clients as well as their target groups were involved. It seemed right to invite them to discuss and verify the success factors and effects mentioned in the guide. Are they complete, correct, relevant, and observable? Second, for future evaluation of effectiveness of LSI it is important that the evaluation instrument is adequate and usable as a tool. So researchers must be invited, too.

For several reasons a regular member check seemed not appropriate for the research project on effective use of LSI

Finally, the phenomenon of an evidence based »information leaflet« is rather new in consultancy. What is needed to make the guide work? What do potential users see as advantages or disadvantages? Involvement of a large group of clients, practitioners and researchers is necessary to discuss content as well as usability of the guide. On the motto »practice what you preach«, why not choose large group methods to involve these stakeholders in interactive conferences as member check?

The concept of the guide for discussion in the member check comprises an Executive Summary with when and how to use LSI, and an Expert Section with facilitation and evaluation guidelines.²

Two international conferences as member checks

The member check is planned in the form of two international interactive conferences: a one day live conference in the Netherlands on 17 Septem-

ber 2009 and an online conference on 1 October 2009. The online conference is added for those who want to participate but are unable to come to the live conference due to distance or work schedules. Participants are selected by personal invitation only, based on their interest in LSI: Clients, Practitioners, and Researchers. Some of them were involved in the test evaluations of the research project.

The planning of the conferences started half a year earlier with selection of the conference location and sending out a pre-announcement for selected invitees. At that time, the test of the evaluation instrument was still going on, and the idea for processing research outcomes into a practical guide wasn't even born yet. Setting the date for the conferences created a solid deadline in the research project.

A few weeks before each conference, participants are asked by email to prepare themselves for their conference by reading the guide and to note their remarks. They are invited to contribute to the aims of the conferences: to discuss the state of the art of the LSI practice, to collectively validate the accuracy of the results of the research project through member check, and to discuss the practical use of the evaluation instrument as presented in the guide. All together, up to sixty people from nine countries, spread over four continents, participated in the conferences. How? What happened?

The live ReSearch Conference

Planning and design

The design of the live conference is built on principles and work forms of the large group methods Search Conference, Future Search, Real Time Strategic Change and Open Space Technology. The conference has also a research purpose, so we named it »ReSearch Conference«. Abb. 2. shows how principles of large group methods are filled in for the ReSearch conference.

The planning group designed a one day conference. The morning program focuses on current practice of LSI and the validity of the guide for evaluation of effectiveness of LSI. The afternoon program considers the utility and usability of the guide. For research purposes, all discussions in small groups will be recorded by members of a support team, in order to capture the argumentation process. Professor Jac Geurts acts as host and facilitator of the conference, Tonnie van der Zouwen is co-facilitator for process instructions.

Morning program: discussing the validity of the guide

On September 17th 2009 forty participants meet for a one day conference in Hotel De Baak Sea-side in Noordwijk in the Netherlands. The theme of the conference is »Towards a more effective

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Principles large group methods	Design aspects ReSearch Conference
Involve stakeholders in the planning	Preparation by a planning group of academic researchers as well as practitioners, seven people in total
Invite the whole system in the room	A diversity of stakeholders with an interest in LSI is personally invited: clients of an LSI, researchers of LSI or other interactive intervention approaches, practitioners of LSI
Participants do their own real time data assembling and analysis, building a commonly shared data base	Overviews are made collectively, all outcomes and conclusions are presented on large overviews on the wall; self-management of small groups; plenary reporting of small groups
Every participant is able to contribute, addressing a diversity of personal capacities	Interactive as much as possible; alternation of individual, small group and plenary work; a diversity of work forms (rational, associative and creative); no long presentations; a comfortable and inviting atmosphere, flowers on the table, beverages permanent available, good food
Looking for common ground and shared understanding	Conclusions are drawn collectively as much as possible

Abb. 2.: Design principles of the ReSearch Conference

use of Large Scale Interventions«. When people enter the conference room, they see a set up that reflects the morning program:

- A theatre part with three rows of chairs for the plenary introduction of the day
- Large posters on the wall form a big timeline to illustrate research process and outcome
- Table groups with eight chairs each for small group work
- Six large prints on the wall present copies of the

tables with success factors and effects, waiting to be filled in with corrections, remarks and priorities

- Large blank paper strips on the wall, to collect individual and small group productions
- Flip-over standards to collect conclusions plenary

Professor Jac Geurts of Tilburg University opens the conference with a reflective conversation

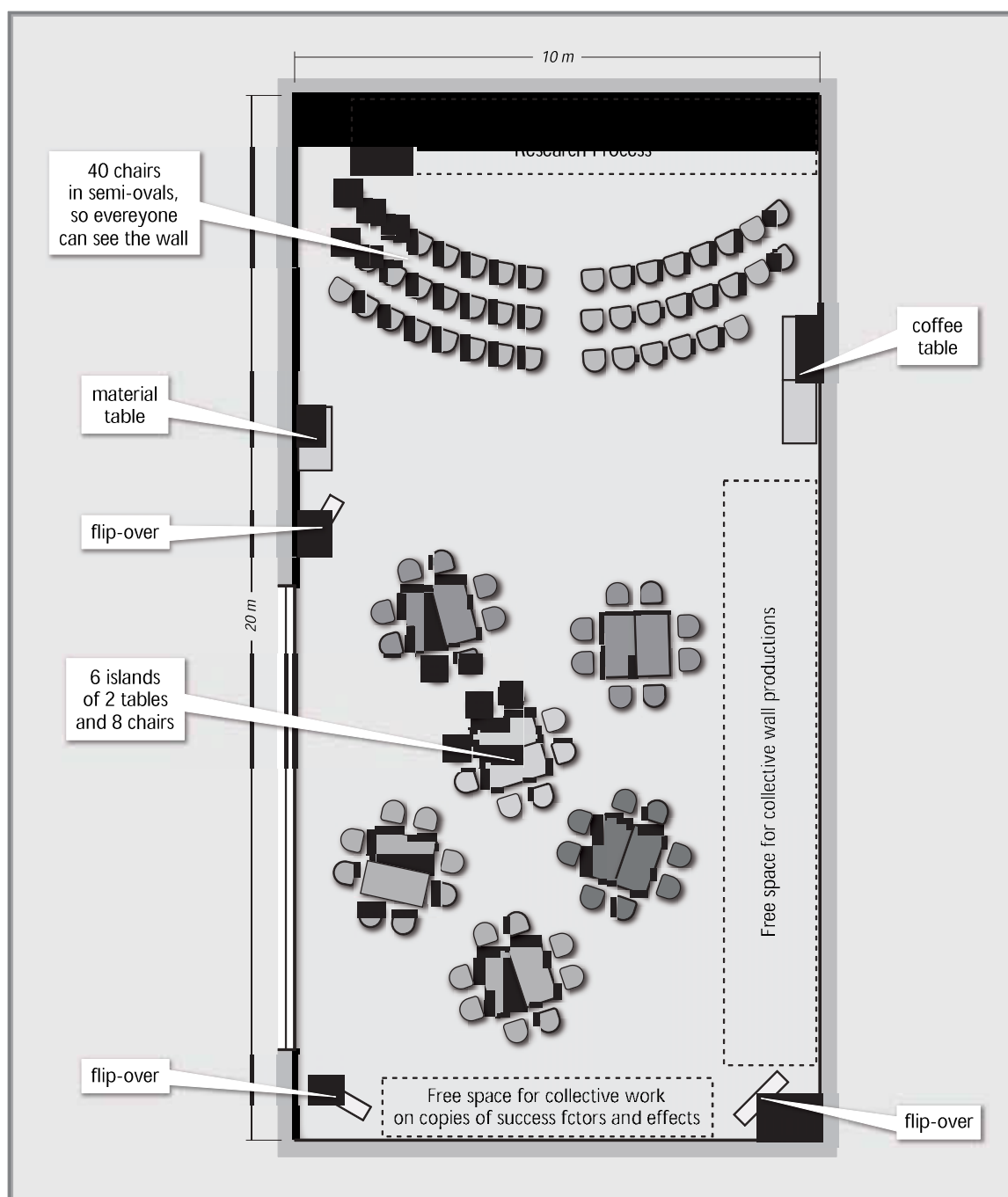


Abb. 3: Set up of the conference room

with the guests of honour Marvin Weisbord and Sandra Janoff, founders of Future Search. They are stimulators for the development of LSI worldwide. A lot of success factors and effects stem from their publications. The conference date and location are planned to enable their participation. The opening conversation reflects on the aims of this research

»This is the first time I experience what it means to be assigned to a stakeholder group; I don't feel a researcher, I want to be in the practioners' group« (Marvin Weisbord)

and of the conference in relation to the current practice of LSI. After the opening, Tonnie tells the story of »the making of the guide«, illustrated by a gallery of large wall posters presenting research steps and outcomes.

After three quarters of an hour, the first discussion round begins. Participants are forming mixed table groups to discuss the guide. They start by introducing themselves. Tonnie forgot to tell this in her instruction, but no problem: People feel writing is not the right way to start and they take their time for introductions, before answering the question »Looking at the guide, what are you glad with, or not-glad with, what do you see as a dilemma?« Participants write their statements on sticky notes

individually, and then they share and discuss their results in their table group. At the end of round one, participants post their notes on a large paper strip on the wall. The notes are categorized during coffee break. What are the remarks about? What conclusions can be drawn? Professor Geurts facilitates a plenary discussion; two members of the support team record the highlights on flip-charts.

In the second round of table discussions, participants are invited to form more or less homogeneous stakeholder groups: researchers, clients, practitioners. Some people don't feel comfortable with their stakeholder label, they switch to another group.

In stakeholder groups participants discuss success factors and effects. Six large wall posters present huge copies of the evaluation instrument. Each person chooses his or her most important items by placing stickers behind the items on the wall posters. They also add their corrections and remarks for the evaluation instrument. When everyone is done prioritizing, a plenary discussion follows. An emerging theme in the discussion is »demystifying LSI«. What can be mastered and scientifically evaluated, what should be left to mystery, things we cannot grasp by science? Abb. 4. presents impressions of the morning program:



Reflection on the state of the art with our guests of honour Marvin Weisbord and Sandra Janoff, founders of Future Search



Gallery talk about the becoming of the guide by Tonnie; posters with illustrations are on the wall



Round 1: Discussion in mixed table groups



Regarding the guide, what are we glad with, not-glad with, what do we see as a dilemma?



Round 2: Discussion in stakeholder groups



Prioritizing the items of the guide on large copies

Abb. 4.: Impressions of the morning program

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Afternoon program: utility and usability of the guide

The afternoon program is done using Open Space Technology. After a short reflection on the yield of the morning by facilitator Professor Jac Geurts, Tonnie explains the rules of the game. Everyone is invited to come up with their topic of interest for further discussion, and to take responsibility for hosting a related discussion group.

The next hour and a half participants discuss the topic of their choice. Each group makes records on flip-charts and prepares a report of max. three minutes for the large group. The results are reviewed in plenary. The conference ends with a short closing circle, followed by an informal drink in the bar. Abb. 5. gives impressions of the afternoon.

The online Open Space conference

For the online conference on October 1st we use OpenSpace-Online® Real-Time Methodology,³ a state-of-the-art tool for online conferencing. Each participant is able to log in to an online Open Space, from any place in the world with access to the Internet. We opted for a three hour conference with max. 30 participants. The conference runs from 3 p.m. to 6 p.m. Amsterdam time (CEST).

From the live conference we learned that a whole 40 pages full guide can be quite overwhelming, consequently we asked participants of the online conference to prepare for the conference by reading the Executive Summary. The central topics for the online conference are announced as:

- What do you think of the content of the guide? Is the information correct, complete, and adequate?
- What are the (im)possibilities for application of the guide, before, during and after an LSI?
- How can the guide help to enhance effective use of LSI?

Twenty people from seven countries participated, including two founders-promoters of Large Group Intervention methods: Harrison Owen and Barbara Bunker. Their publications have deeply influenced this research project.

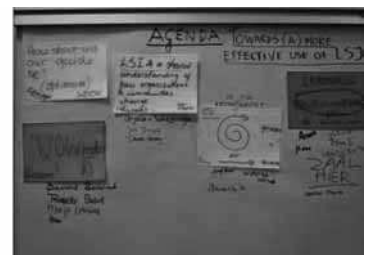
As in a live Open Space, participants set the agenda by identifying topics to work on. Comoso, our virtual facilitator, explains the rules of the game. On screen people can see what topic is discussed in which virtual room. The law of two feet is applied by a single mouse click. You can see who is in a specific room, there are break out areas for free discussions or to hang around as butterfly. All discussions are done by typing in a chat box and everything is recorded integrally. On their computer screen participants see the work area in the middle, the session



Introduction of the afternoon program in a setting for Open Space



What topics do you want to discuss further?



Agenda, set by participants



Self managed discussion groups



Bumble bees and butterflies meet outside the discussion groups



Plenary report of each discussion group

Abb. 5.: Impression of the afternoon program

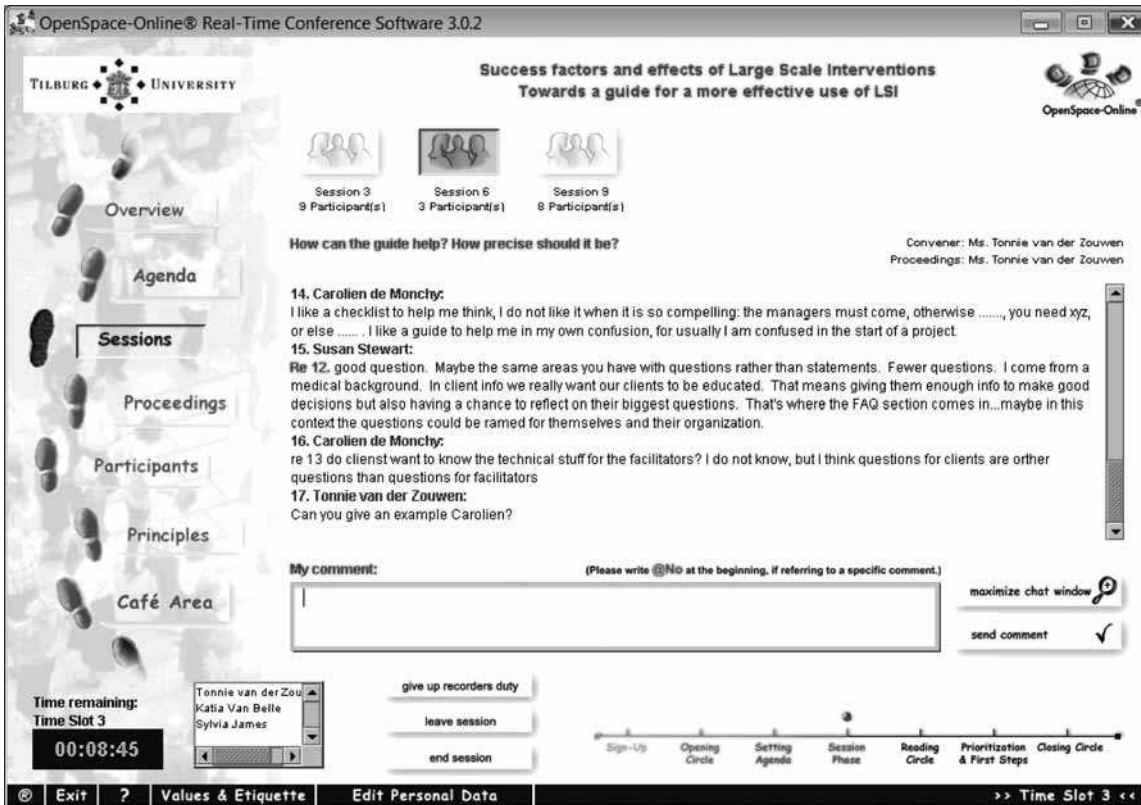
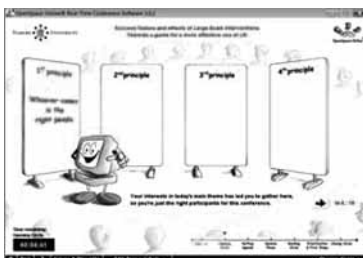


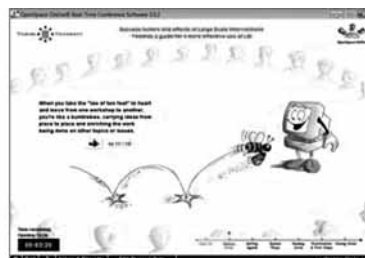
Abb. 6.: Screenshot of the online conference; published with permission from OpenSpace-Online GmbH

rooms at the top, and the menu at the left. The conference steps and time remaining for the current step are showed at the bottom of the screen.

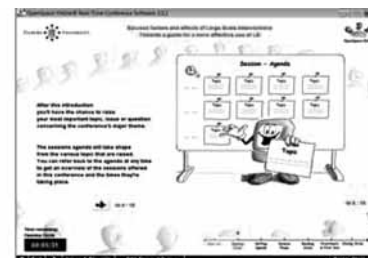
Discussion of topics is done in three rounds of 25 minutes each. In the 15 min. breaks, each convener writes the proceedings of his or her



Comoso, our virtual facilitator, explains the four principles of Open Space and the law of two feet



Hopping from one group to another as a bumblebee is done with one mouse click



Bringing up topics, setting the agenda



Ranking for further discussion of hot topics



There is a café area to chat with each other



Immediate digital reporting of all discussions and conclusions

Abb. 7 Screenshots of the online conference, published with permission from OpenSpace-Online GmbH

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„Humor ist trostreich und
verwandt mit der Hoffnung.“

session. After a reading circle for the proceedings, topics are collectively ranked. The »hot topics« are selected and discussed further in the next round. Immediately after the closing circle, all participants receive the automatically generated conference report. For an impression of the conference steps see Abb. 7.

Typing takes time and discussion threads may intertwine. Most participants have to get used to chatting with short sentences, using abbreviations and turbo language. You are forced to concentrate on your discussion line. Some participants mention it is an intensive and tiring experience. Although it is not as good as a three day live meeting, the online conference is generally evaluated positively: it works, a lot of work with valuable outcomes is done in only three hours, and it enables people from all over the world to meet saving travel time and costs.

Results

A whole range of rich results

The conferences produced a large amount of results in various forms. As the conferences are

part of the research project, all data have to be processed into research conclusions on validity, utility and usability of the evaluation instrument and for improvement of the practical guide. Some results are concrete in the form of remarks, discussion reports, and priorities. Other results are less tangible, in the form of new contacts, intensified relationships, experiences, and changed awareness. The conferences themselves form a worthwhile result: To have just under 60 experienced people who cared to show up and discuss this research on effectiveness of LSI is inspiring and great acknowledgement.

Analyzing method

The results are processed with a qualitative data analysis method as used to form grounded theory,⁴ following the steps as shown in Abb. 8.

All data are translated into »building blocks«, units of text that can stand on their own, representing a specific meaning. The building blocks are labelled with a code of their source and assembled in a digital table, using a first rough categorization. In several rounds the building blocks are compared and arranged around emerging themes. Conclusions and memos are added in the right column

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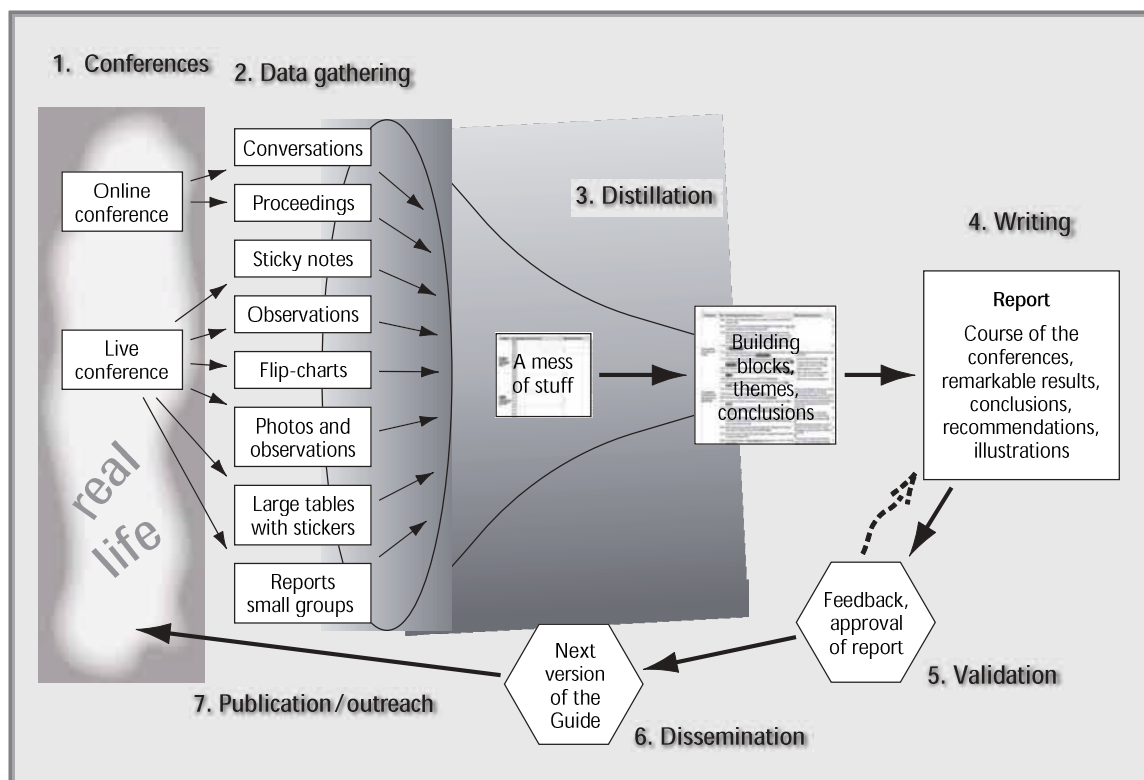


Abb. 8: Analyzing procedure; adapted from the figure "The Stages of Learning Histories" of Art Kleiner

of the table. The analyses produced 423 building blocks, spread over 24 categories.

The process of distillation leads to conclusions and recommendations, detailed corrections and additions of the guide and the list of success factors and effects, see the report of the conferences⁵. The suggested corrections and additions are going to be integrated in the next version of the guide.

Main conclusions about evaluation of effectiveness of LSI

For this article the focus is on the set up of the conferences as member check. However, some conclusions on the research are interesting to get an idea of the discussion between researchers, practitioners and clients of LSI. Main themes and conclusions are:

- The role of the leaders and expectation management by consultants are seen as the most important success factors.
- The paradox of sustainable change and planned follow up: Sustainable change is an oxymoron, a figure of speech that combines normally contradictory terms. You try to create a transformation, to create a system you believe in, at the same time you have to iterate that interaction in each present as repetition or habit.
- There is no consensus about planning of follow up beforehand and the role of the consultant in the follow up; advocates of planning follow up state that the whole LSI and the follow up should be embedded in a continuous development vision; opponents state that the LSI *is* the change, a turning point; if people are empowered they will take responsibility and organise the follow up themselves.
- We have to live and work with a paradoxically causality. In LSI working participatory is both a condition and a result. There is a paradox in the conditions you need for LSI (enough trust to show up and communicate with each other), the complex situations LSI is indicated for (inherent conflicts and different interests) and the intended effects (more trust and better communication).
- This paradoxical causality does not match with linear academic research traditions and linear measuring of cause-effect relations;

sophisticated qualitative research methods are needed to deal with non-linear processes, acknowledging multi-variable complexity, and involve facts as well as ideas and feelings.

- Do we need a scientific approach? Some say No, we already know that it works, others say Yes, it offers a framework for evaluation and conversations during the trajectory; see Abb. 9 for a summary of Pros and Contras of an evidence based guide.
- Evaluation should be done with more than one person. Who should perform the evaluation of an LSI and how depends on the goal of the evaluation; evaluation should be discussed beforehand and built into the contract.
- The guide is a tool to make explicit what a good facilitator does implicitly, thus helping those who are less familiar with LSI in facilitating; it can also be used in other scientific fields.
- How extensive should the guide be? The guide is meant as a framework, to be filled in for specific methods and situations. How long the guide should be depends on what it is used for.
- For embedding of the guide, different forms and types (regarding look and feel) for different purposes and user groups are recommended. Suggestion: Offer the guide as »open source« on the web, so everyone can contribute with stories, How To, best and bad practices etc.

Conclusions on conferences as member check

Appreciations and improvements, suggested by participants

What do participants think of the conferences? A brief summary follows of lessons learned, presented as appreciations and lessons for each of the conferences.

Appreciations for the live conference:

- The way we are doing this is an innovation for science
- We're in this together, we're learning all together
- We practice what we preach by doing this, learning from stakeholders, a form of professionalizing

Pros	Contras and dilemmas
<p>Establishes common ground across Large Group methods, through convergence at the level of principles:</p> <ul style="list-style-type: none"> • Facilitates dialogue about LSI and its effectiveness • We can use it to relate to other fields • Brings research thinking and practice together • An attempt to validate the field 	<p>We don't need the rigor of a scientific approach:</p> <ul style="list-style-type: none"> • Reduces openness and flexibility when the guide is misused as too steering, too normative • Kill of enthusiasm by a too cold scientific approach • Risk of losing the essence of the art of facilitating • We already know it works • Clients and consultants might not be interested in evaluation, because they have an interest in an image of success
<p>Potential to help both client and facilitator to improve the quality of an LSI:</p> <ul style="list-style-type: none"> • Helps to convince others • Framework for assessment of preconditions, to develop a good contract • Helps in expectation management • Framework for evaluation • Tool for training of consultants • Facilitates learning of past projects, to improve our practice • Tool for assessment of facilitators 	<p>Dilemma: The history of science is in the way. Research is often seen as exclusive for linear cause-effect processes:</p> <ul style="list-style-type: none"> • It must be very clear what causality is adopted in this research, including the worldview it is based on and the consequences for evaluation of effectiveness • Measuring is a linear process, that doesn't fit the spiral/circular change process, and success always has more fathers; effects should always be described in terms of »the LSI contributed to ...«

Abb. 9.: Pros and contras of a practical guide for effective use of Large Scale Interventions

- This conference makes discussion possible.

Lessons from the live conference:

- What an almost impossible task we asked participants of the research conference. We should have given much more attention to introduce them into the assumption and choices made, the considerations, arguments. More space for explanation of context and goals of the research.
- In general take more time to learn to know each other, to connect to each other and to the subject. More time for plenary discussion, less directions and controls
- In addition to collective data gathering: do the data analysis also collectively; more voice for participants, less role and control by facilitators
- Ask more explicit for commitment to participation after confirming (what does it mean when you say yes and don't show up without any notification)
- Invite more clients, they were relatively under represented

Appreciations for the online conference:

- The terrific organization, a model for what is needed to support good collective thinking
- It is an intensive and tiring experience, but

although it is not as good as a three day live meeting: it works fine.

Lessons from the online conference:

- For a member check we have to plan more time for topic selection and/or ask participants to prepare their topics in advance
- We have to learn how to »chat«: use short sentences, abbreviations
- It is hard sometimes to follow the line of thought, with several threads intertwining
- Organize convergence in another way

Personal reflection on the conferences as member check

There is a massive publication bias on effectiveness of LSI, almost all articles report success. Practitioners know LSI works and want to show it. In my own consultancy practice I have wonderful experiences with LSI, I have seen breakthrough results. I also know it doesn't work every time and everywhere, and that sustainable results are not easily reached. As practitioners, researchers and clients we can get smarter from systematic evaluation, building a synthesis of what we know what works and what doesn't work. Although success is never guaranteed, especially not in complex

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situations, it doesn't mean we can't enhance the chances for success. A practical guide for assessment of conditions and performance can help. The member check conferences succeeded to involve stakeholders in academic research. Participants of the conferences contributed in

various ways to further improvement and embedding of the guide. They provided input for next steps in synthesis of the field beyond specific large group methods, and for more effective use of large scale interventions as approach for organisational change.

Anmerkungen

1. Project of the department Organisation Studies of Tilburg University, executed by Tonnie van der Zouwen as PhD study, and coached by Prof. Dr. Jac Geurts.

2. Visit www.tonnievanderzouwen.nl/wiki to download the discussed version of the practical guide. This website serves as open source for

those interested in research process or outcomes.

3. For more information and do-it-yourself organizing see www.openspace-online.com

4. Methods are used as described in the book *Doing Naturalistic Inquiry, A Guide to Methods*, by David A. Erlandson et al., 1993

5. For those interested in building blocks and conclusions, see Appendix 2 of the conference report on www.tonnievanderzouwen.nl/wiki under Research Conferences.

