

Large group processes



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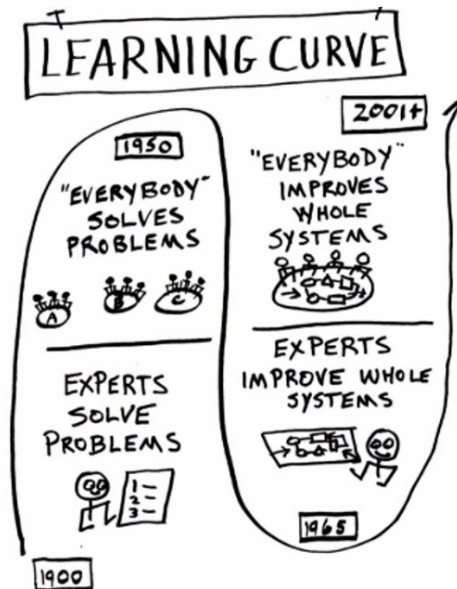
To change an organization, the more people you can involve, and the faster you can help them understand how the system works and how to take responsibility for making it work better, the faster will be the change. It doesn't happen through isolated pilot projects —Marvin Weisbord
'a lot of the work is trying to involve people from the whole system – wouldn't it be great to short-circuit a lot of the work?'

Techniques to Match to Our Values – Weisbord

- In 1969, technology was limited, organizations reorganized 'every seven years'. The pace of organizational change accelerated over the decades.
- The 'learning curve' traces the evolution from Taylorism (experts solving problems) to participative management (everybody solving problems).
- Frederick Taylor's principles of scientific management emphasized efficiency, cooperation, and development of workers but were often reduced to time and motion studies. Taylor's values included rational systems and eliminating labor/management conflict, but his methods were criticized for being dehumanizing.
- Alternatives to Taylorism emerged in the 40s and 50s, focusing on democratic leadership, group problem-solving, and teamwork.
- Kurt Lewin and Ronald Lippitt's research on group dynamics highlighted the benefits of democratic leadership over authoritarian methods.
- Socio-technical systems design, developed by Eric Trist and others, emphasized multi-skilled, self-managing work teams and flexible, dynamic organizations.
- The socio-technical approach involved labor-

management collaboration and participative design practices.

- Large group interventions, such as the Conference Model, aimed to involve more people in the redesign process and achieve faster implementation.
- Weisbord advocates for 'getting everybody improving whole systems' to create productive workplaces with dignity, meaning, and community.
- Effective design processes should include the whole system in the room, focus on the future, and enable people to use their existing skills.
- Large group interventions provide opportunities for new behaviors and fluid coalitions, turning systems thinking into experiential activities.
- The future of organization design depends on the values of the people involved, not methods.
- Critical to align techniques with values to achieve sustainable and meaningful organizational change.
- Historical figures have provided valuable insights, but current practitioners must adapt to modern challenges.



An interview with Paul Tolchinsky

'Carried bag' for Eric Trist – Eric 'helped people design and create their own workplace'. Saw the pieces, was more interested in the whole. A more difficult time with managers.

Factory with 140 day strike – smashing windows, then went back to work...

Cybernetic root to all of these things – all studying a lot of the same things

Eric's world – you change the social system, you change the technology, and you change the interfaces.

At the time, debating Kurt Lewin human relations sort of model and / versus the Tayloristic model – he was a humanist and a human psychologist first.

Met Taiichi Ohno several times – hardware, software, and humanware. They added 'voice of the customer' and 'linestop' – accountability and power.

Asked 'why does the cycle time on change take so long?' Deliver change just-in-time

At the time, the way the work was done – they weren't looking at ecosystems, at permeability of boundaries, at reconfigurability. Few designed for the many. Needed to redesign design.

Started with a microcosm of employees. But then it would take months to sell it – because the whole hadn't been on the same journey. Same journey Marv Weisbord took.

Kathie Dannemiller, Paul's partner, believed that was more limiting. To Marv – 64 people was enough to have all the dynamics

Bill Passmore – fast cycle change

The Axelrods – the conference model

All attempts to bridge the cycle time divide – how do you engage the many to decide for the many.

Risk is we ignore part of the system because of the complexity – it's almost always the thing that stops the change

Can't look at them linearly, that's not the way they work

1990s – whole system process but still fairly linear

Why not do all simultaneously and iterate it? Developed Large Scale Interactive Processes.

Keep it to the minimum critical – sociotechnical design principle

And look at it holistically in a way that doesn't freeze it

Late 90s/2000s doing more synchronously, more simultaneously – discover, dream, decide iteratively

David Cooper-Rider – Appreciative thinking and Appreciative Inquiry comes from

Bill Passmore and Paul did a project – David and colleagues were supporting

Did an organisation diagnosis – half of the system interviewing the other half – interview about everything working – then everything that's broken – Olympic Gold report and obituary

Ten workshops with 25 people each. The obituary people want to go first – dressed in black, fake coffins, read the eulogy. ...by the time they were done, there was no energy in the room... chilling...

hopeless. Then – the 'Olympic report' – people dancing on the tables

David Cooper-Rider – 'why are we focused on what drains energy?'

Much easier to create your future than it is to try to fix your past

Seeking people who live the future today...

Take whole systems thinking, appreciative enquiry and org design all together..

Evoke the wisdom in the system



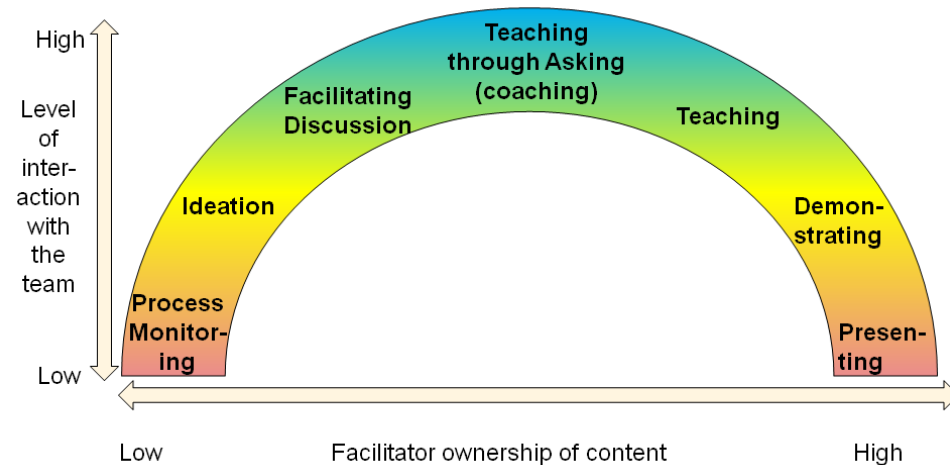
Facilitation and workshop design

BRIEF REVIEW OF PREVIOUS MODULES

Facilitation

- Facilitation ensures structured and effective human interactions, crucial for achieving shared goals in complex settings.
- Facilitators act as guides, energy holders, or taskmasters, shaping group dynamics and outcomes.
- Balancing authority and vulnerability is essential to foster trust while avoiding coercion and respecting agency.
- Techniques like facilitation canvases and session flows help structure planning and execution.
- Room layout and atmosphere profoundly influence participant engagement and collaboration.

Jim Elliott 'Every time I intervene, I deprive a group member of the chance to do something important.
In Janoff and Weisbord (2004)



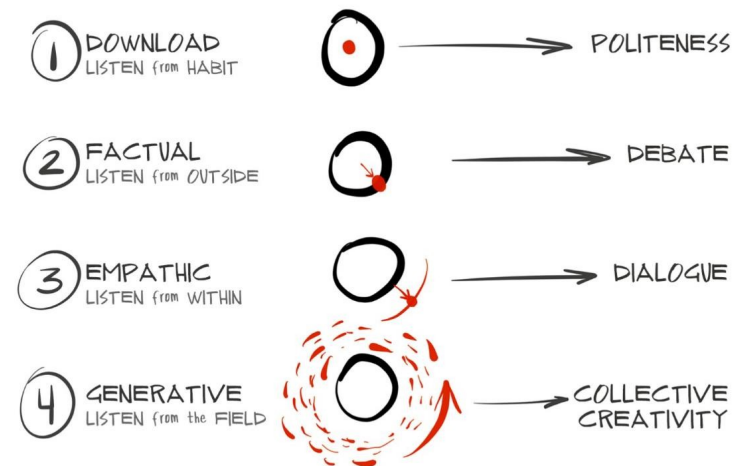
Annette Simmons, Group Process consulting
'Don't become a load-bearing wall, otherwise the moment you leave the agreements they made are at risk of falling apart.'

Seeing facilitation as managing relationships highlights its unpredictable, dynamic nature

Power and risk

- Naïve / superficial facilitation avoids certain risks, but deeper methods engage complexity and human dynamics.
- Managing potency: effective facilitation balances the power of influence with safeguards like norms and boundaries.
- Awareness of personal and group assumptions supports intentional and ethical interventions. Understand, interrogate, and set your stance.
- Safe, supportive environments encourage openness and effective emotional processing.
- Facilitators model behaviours, shaping expectations and fostering respectful interactions.

FOUR LEVELS of LISTENING & CONVERSING



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Purpose aligns goals, expectations, outcome – will also shape and exclude possibilities

Tools for design and planning

- Diamond-shaped session flow: involves stages of divergence (exploration), emergence (discussion), and convergence (decision-making).
- Chris Corrigan's seven helpers – practical tools for fostering dialogue, action, and sustainable group cohesion.
- Five rhythms/energies: flowing, staccato, chaos, lyrical, and stillness.
- Context cues: environmental signals shape participant behaviour, aligning with meeting goals.
- Group size: smaller groups foster dialogue (four!), while larger ones require intentional structures to prevent fragmentation.

A facilitation canvas (Taylor)

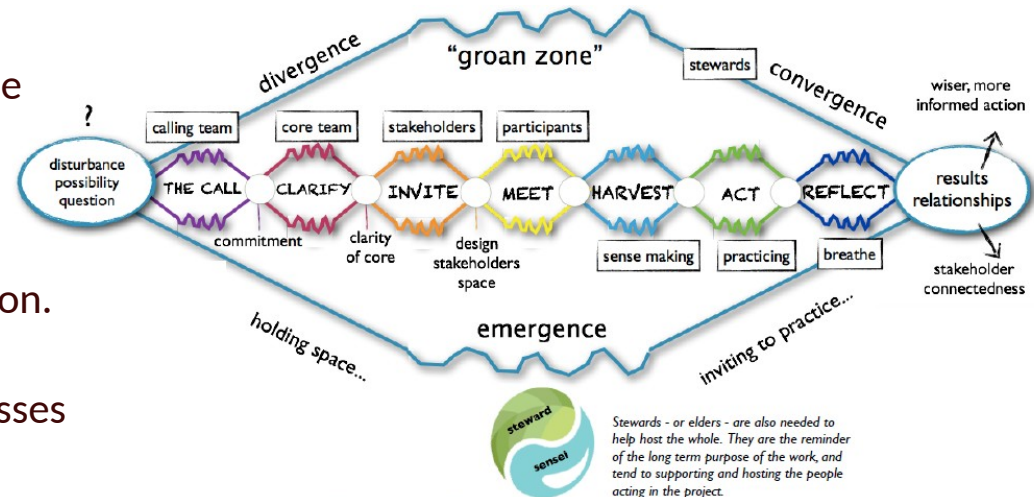
Planning	People/contributors Who needs to be there? Who needs to produce content? Who needs to follow up afterwards?	Preparation What does 'ready to roll' look like? How will we know when we've done just enough?	Inputs What content – if any – is needed? What else is needed as an input on the day?	Environment What plans does the environment have for participants? What cues is the space giving?
	Pitfalls How might this go horribly wrong? What's the worst possible outcome? How can we avoid the bear-traps?	Assumptions, values, and beliefs What assumptions, values, and beliefs do I currently hold? How useful are they? What would be better?	Intent Do I hold a good and clear intent? Can I write it in a single sentence with no 'and'? What other intents are being brought into the space?	Container How can I create the right kind of 'space' for the work that needs to be done?
Vibes				
Process	Outcomes What does good look like?	Outputs What do we need to produce?	Agenda How should we best plan the session? What do we need to include in that plan?	Reflection How will we learn from the work?

Note the order of the rows, and where the agenda comes in

Weisbord and Janoff: engage all relevant stakeholders and surface shared values

Approaches to workshop flow and dynamics

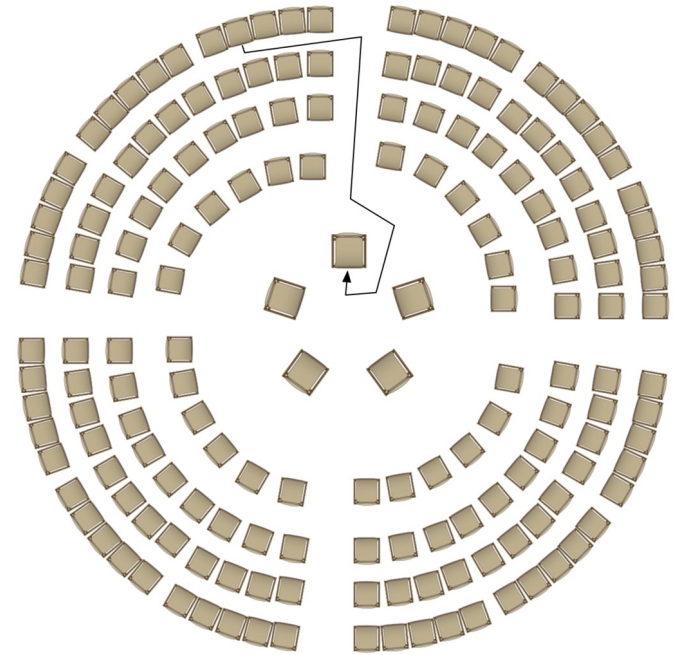
- Divergent and convergent patterns: alternate between exploring diverse ideas and focusing on actionable insights.
- Differentiation and integration: balance individual views with collective goals.
- Four dynamics: encourage group alignment through segmentation, blending, empowerment, harmonisation.
- Eight Breaths of Process Architecture: framework for navigating group processes and transitions.
- Six conversations that matter: foster connection, reflection, and actionable insights through meaningful dialogue.
- Five rhythms: match facilitation strategies to the group's dynamic energy flow.



Finding the flow and shaping the flow

Practical tools and techniques

- Ground rules and icebreakers: establish shared expectations and build rapport.
- Dyads and triads: enable focused, small-group interactions for deeper idea generation.
- Clustering and decision analysis: facilitate idea organisation and prioritisation with visual and voting tools.
- Gallery walk: encourage active group engagement by displaying and reviewing collective outputs.
- Circle patterns: use spatial arrangements like fishbowls to enhance participation and focus, with an egalitarian implication.
- Co-coaching and TOOTs: support reflective learning and system-wide understanding.



Tarmo Toikkanen, CC0, via Wikimedia Commons

Deploying effective deep tools while avoiding facilitator-induced cringe



INTRODUCTION TO LARGE GROUP PROCESSES

Introduction

Large group processes: participatory methodologies designed to engage diverse stakeholders in addressing complex challenges and co-creating solutions.

The intent is to:

- foster alignment on shared goals and visions
- enable systemic change by involving ‘the whole system in the room’
- support collaborative decision-making, innovation, and community building.

Central concepts

- ‘Whole system in the room’: large group processes aim to represent all parts of a system—different stakeholder groups, levels of hierarchy, and diverse perspectives—to ensure holistic and inclusive outcomes. First coined in Future Search (Weisbord and Janoff) and popularised across large group process methodologies.
- Stakeholder inclusion and legitimacy: large group processes work on the principle that sustainable change requires the active involvement of those impacted by decisions.

Bringing E, S1-S5 into the metasystem space?

Some views and labels found in literature

- A principle-based action meeting and planning method (Weisbord, 2008)
- A specific philosophy of facilitation, a hands-off approach that enables people to take responsibility for themselves, making it a structural approach rather than behavioural (Weisbord & Janoff, 2010a)
- LGI is a catalyst in a transition (Bunker & Alban, 1997)
- An incubator in which directional, contextual, relational, and task-coherence dimensions can ripen and evolve (Barbeau & Aronson, 2006)
- LGI as *rite de passage* (Senge, 1999; Weber, 2005b)
- A means to build learning bridges between those in power and the other voices in our society so that something new can emerge (Tan & Brown, 2005)
- A process of teaching people to work with a set of principles, to break the cycle of dependency on consultants (R. H. Axelrod & Axelrod, 2006)
- A process for social capital development; a goal-oriented effort, to create better working relations and prevent conflict (Hasle & Møller, 2007, p. 424)
- A new paradigm beyond change management (Nistelrooij & Wilde, 2008).

van der Zouwen, 2021

Concept

Key features:

- Scale and inclusivity: designed to handle groups of 50–2,000+ participants, incorporating diverse stakeholder perspectives.
- Focus on systems thinking: treats challenges as interconnected, addressing root causes and systemic dynamics rather than isolated problems.
- Time-efficient design: many large group processes compress months of dialogue into two or three days of intensive participation.
- Action-oriented outcomes: large group processes prioritise actionable commitments, ensuring participants leave with a shared, tested plan.

Pushing balance to the co-create space

Tell-Sell-Test-Consult-Co-create Elaborated version

Approach	Tell	Sell	Test	Consult	Co-create
		Engage			
What the leader does	Gives an instruction	Seeks buy-in	Invites response	Requests assistance	Collaborates
What the leader says	"This is the plan. Get going."	"This is the plan, the benefits of which are as follows ..."	"This is the plan. Tell us what you think about it, and we will consider incorporating your ideas."	"Please help us create the plan."	"We've got a blank sheet of paper. Let's create the plan together."
Does scheme already exist? SEE BELOW	Yes (in final form)	Yes (in final form)	Yes (in draft form)	No	No
Who makes final decision?	Leader	Leader	Leader	Leader	Everyone (within constraints)
Communication method	Top-down messages	Top-down messages	Top-down and bottom-up messages	Top-down and bottom-up messages	Generative conversations
Level of ownership and commitment	Low				High
Capacity for responding to VUCA scenarios	Low				High
Worldview	Newtonian-Cartesian Spiral Dynamics BLUE Wilber / Laloux AMBER	Newtonian-Cartesian Spiral Dynamics ORANGE Wilber / Laloux ORANGE	Pre-systemic Spiral Dynamics GREEN Wilber / Laloux GREEN	Pre-systemic Spiral Dynamics GREEN Wilber / Laloux GREEN	Systemic Spiral Dynamics YELLOW Wilber / Laloux TEAL

Scheme means strategy, piece of communication, planned course of action, or some other form of now-to-new intervention. Original model by Bryan Smith, based on Tannenbaum & Schmidt | This version by Jack Martin Leith | jackmartinleith.com

Propaganda

- Slow, lacking agreement, designed abstractly and top-down, off strategy, 'wicked' approaches
- *versus* Fast, agreement-based, strategic, potentially adaptive, driving real transformation

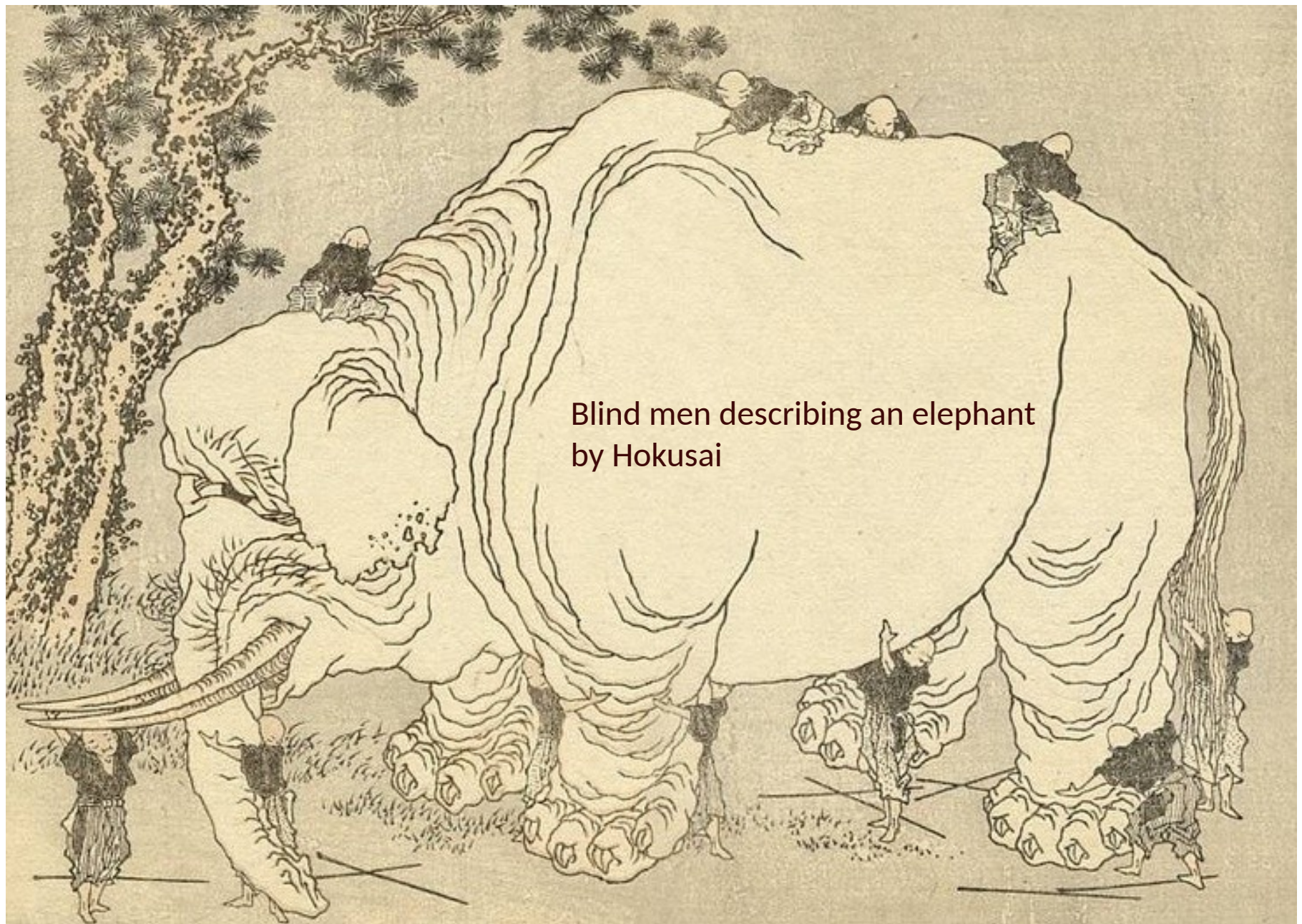
Weisbord

- Little or no diagnosis is required to stimulate constructive action.
- Systems can transform their capability for action in a matter of days, not months or years.
- Little or no action planning is needed to get people acting together once they experience the whole together.
- Moreover, they cannot experience it any other way.

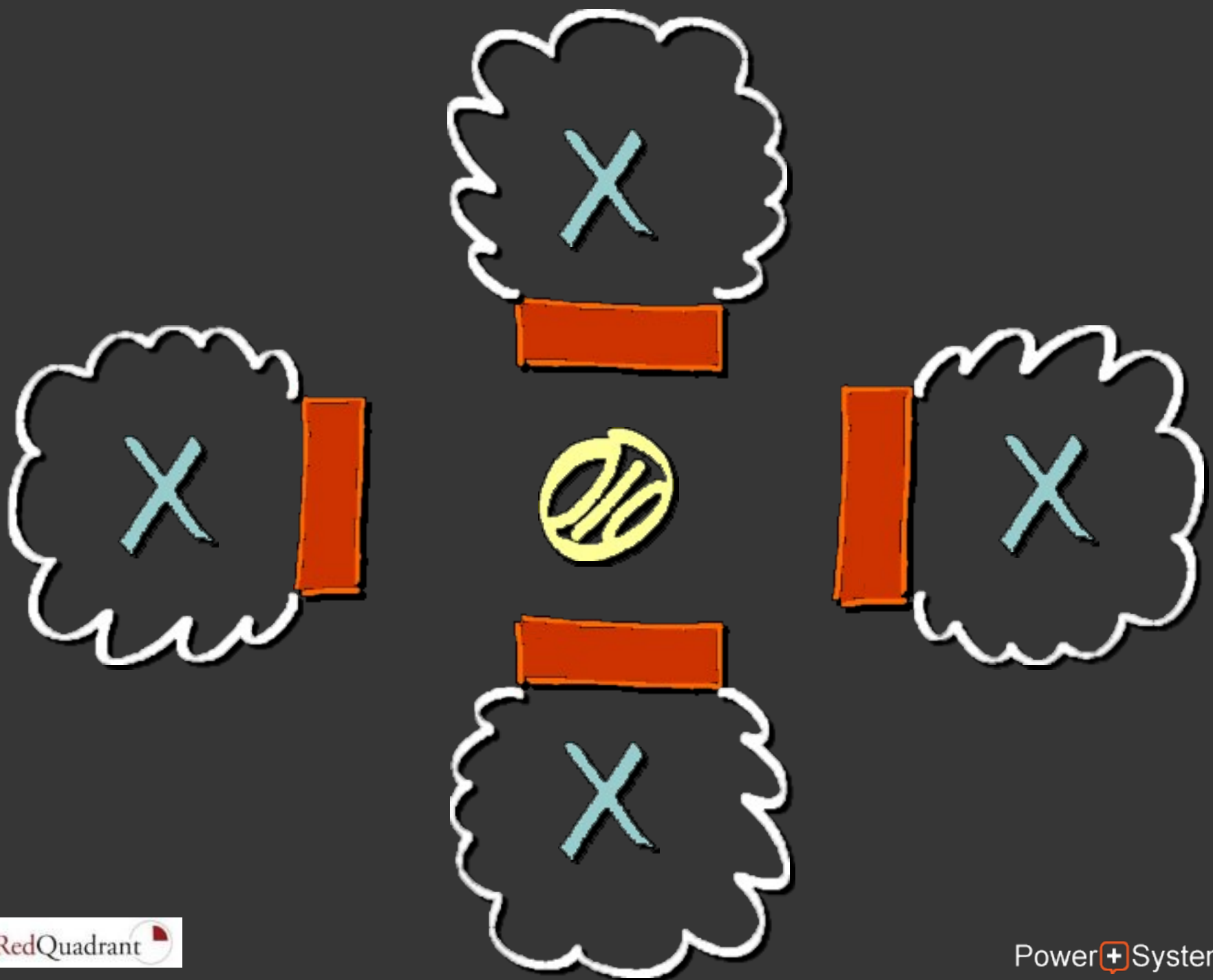
TABLE 1: COMPARISON OF SLOW CHANGE AND FASTCHANGE

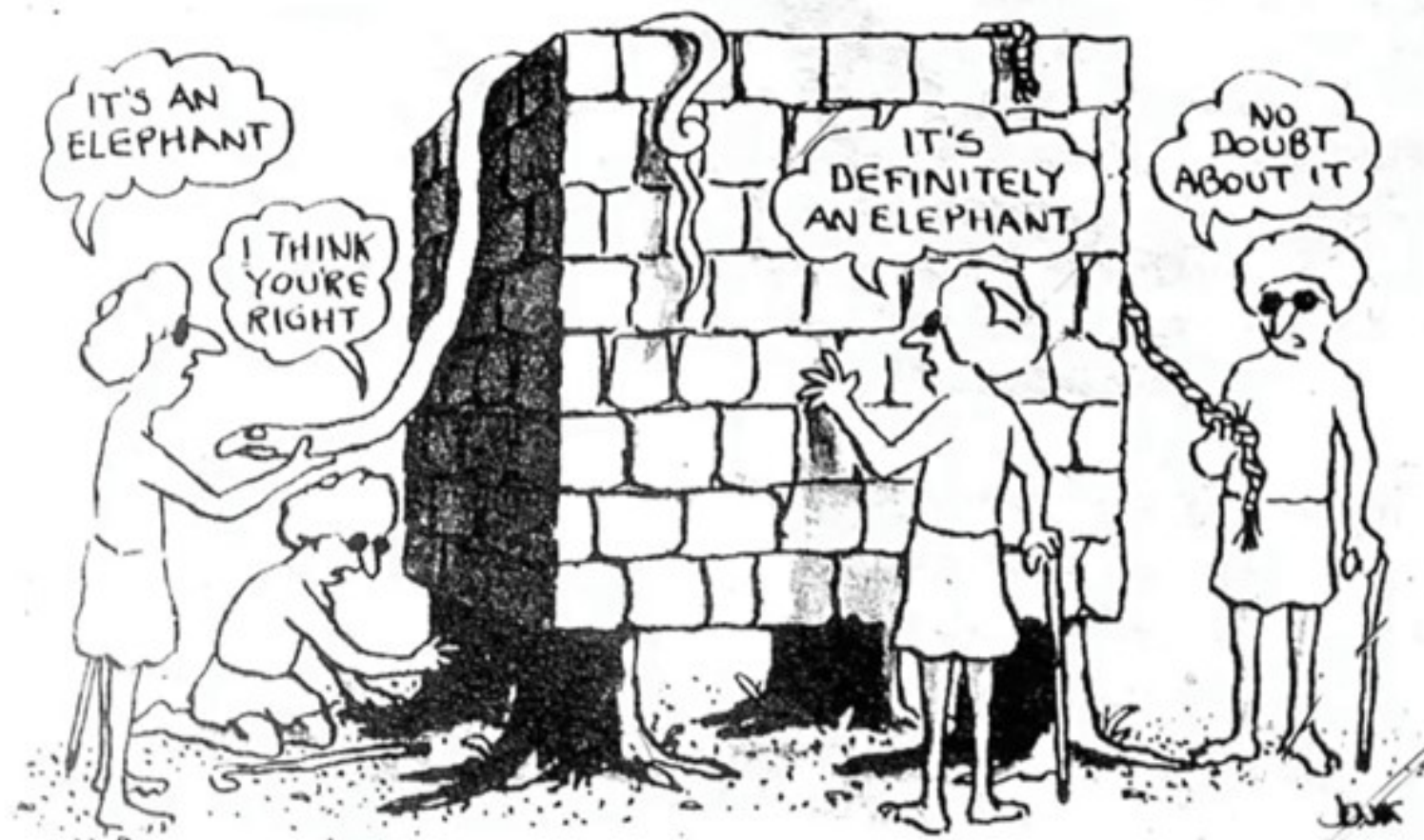
<i>Slow change</i>		<i>FASTCHANGE</i>	
-1	Old model of leadership	+1	New model of leadership
-2	Imposed change	+2	Co-created change
-3	Change requires control and domination	+3	Change requires trust and co-operation
-4	Narrow stakeholder involvement	+4	Broad stakeholder involvement
-5	Incomplete map of current reality	+5	Complete map of current reality
-6	Focus on problems	+6	Focus on possibilities
-7	Vision shaped by elite group	+7	Vision shaped by everyone
-8	Linear thinking	+8	Systems thinking
-9	Transmission of messages	+9	Strategic conversations
-10	Plan then implement	+10	Plan & implement simultaneously

Any table with old, bad on the left and good, new on the right is selling something



Blind men describing an elephant
by Hokusai





History

- Pre-war: Taylorism (and Gilbreth)
- Origins in post-war thought: influenced by Kurt Lewin's work on group dynamics and the action research approach.
- Systems thinking from war technology
- Tavistock Institute's contributions to organisational psychology laid the foundation for participatory methods.
- Growth of Organisational Development (OD) practices, often from post-war group therapy: the 1960s and 1970s saw the rise of methods like the Search Conference (Emery & Trist), and later Syntegrity (Beer), focusing on systemic approaches to organisational and societal change
- Introduction of socio-technical systems theory and participatory design.



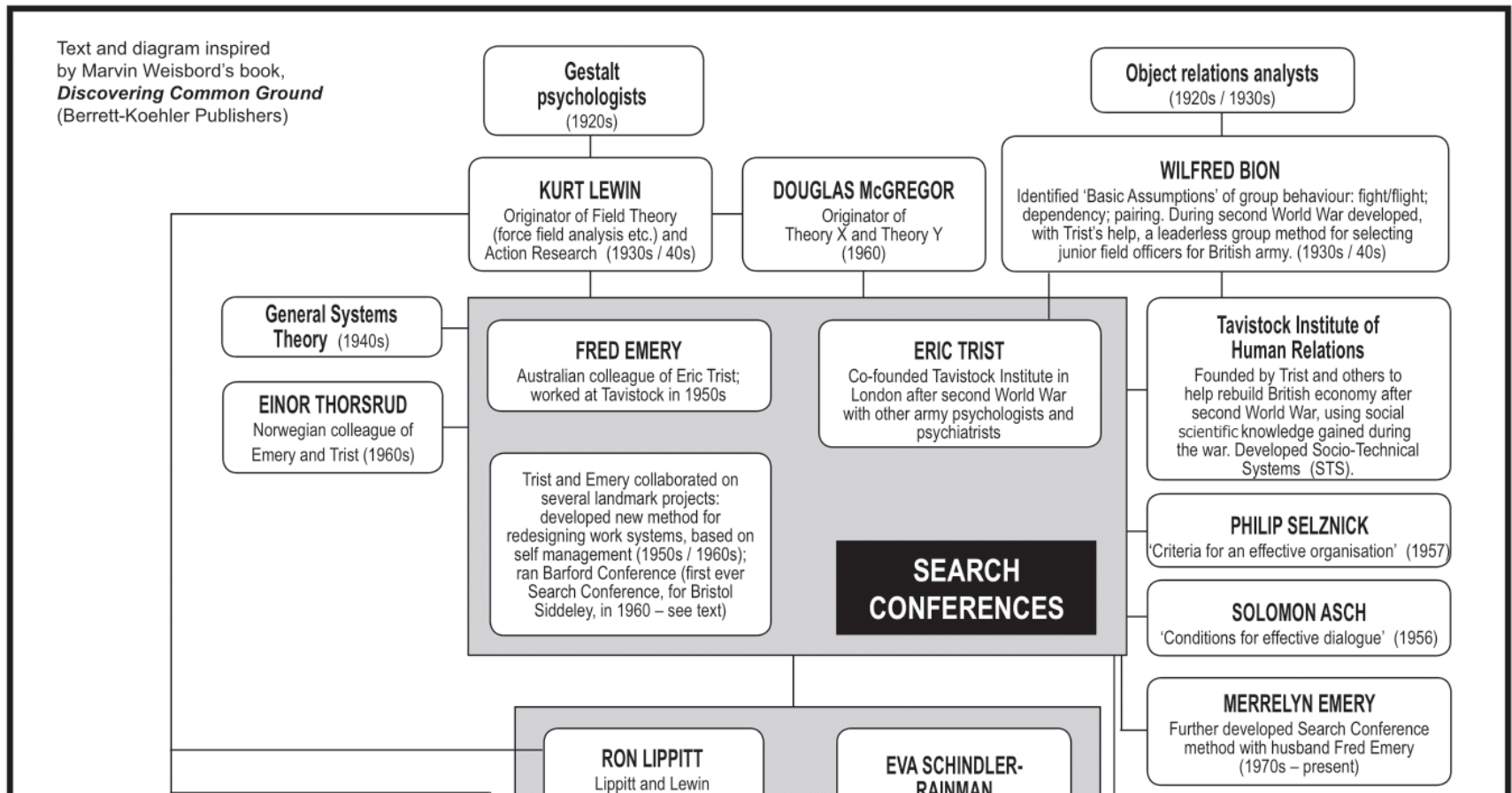
Emergence of large group processes:

- Future Search (1980s) Weisbord and Janoff: 'whole-system in the room'.
- Open Space Technology (Harrison Owen, 1985): Revolutionised self-organised collaboration.
- World Café (Brown & Isaacs, 1990s): made informal conversational methods accessible for large-scale use.
- Real-Time Strategic Change (Robert Jacobs, 1990s): focused on aligning large organisations in real-time.

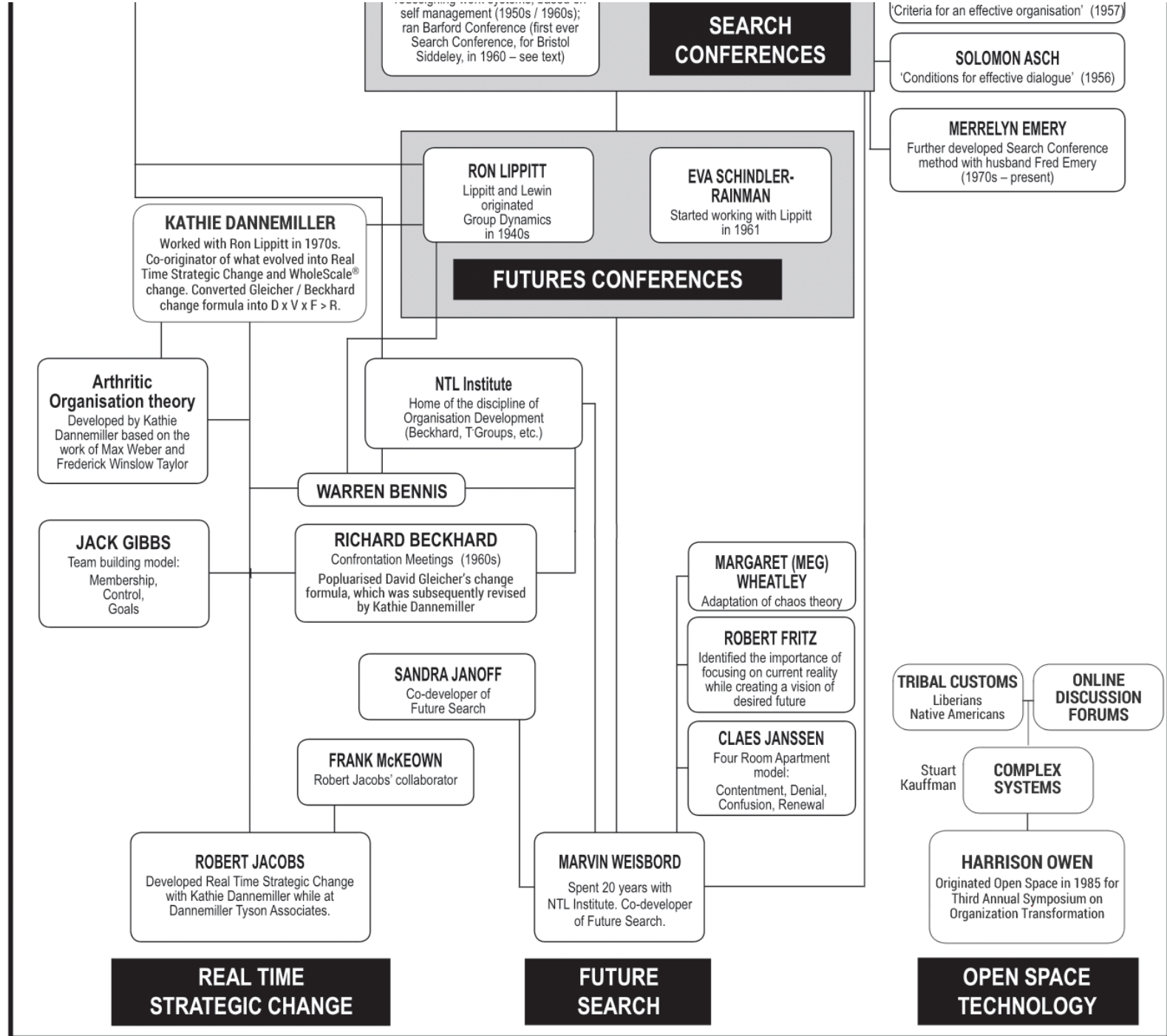
Contemporary trends:

- Hybrid approaches blending methods
- Digital tools for virtual large group work

Large group intervention methods; a brief history



Jack Martin Leith (2004); based on Weisbord (1992)



Reflection

- How do I see myself as part of this history of organisational development and 'systems interventions'?
- What resonates and appeals to me in what I have heard?
- What do I have reservations about, and what are they?



Large group processes draw on a rich tapestry of theories, including systems thinking, group dynamics, social constructionism, and action research, to foster large-scale change.

These foundations ensure large group processes are participatory, systemic, and adaptive, addressing the complexity of modern challenges.

CORE THEORETICAL FOUNDATIONS

Systems thinking

Large group processes are grounded in a type of systems thinking which views organisations, communities, or problems as interconnected wholes rather than isolated components.

- Interconnectedness: every part of a system influences and is influenced by others.
- Boundaries and perspectives: systems thinking examines what is included / excluded in decision-making, using tools like Boundary Critique (Ulrich, 1983).
- Feedback loops: large group processes address reinforcing and balancing feedback loops to identify leverage points for change (Meadows, 2008).

Griffin et al: Bertalanffy, 1952; Emery & Trist, 1965; Katz & Kahn, 1978; Senge, 1990

Examples in large group processes:

- Future Search and Scenario Planning bring together diverse stakeholders to map interdependencies.
- Participatory Systems Mapping helps visualise relationships and systemic effects.
- Viable Systems Model (Stafford Beer): Applied in Syntegration to optimise systemic viability.



Systems thinking is more *evident* and *possible* if you imagine you have the system in the room

Social constructionism

Reality is co-created through shared meanings and narratives, making collective dialogue central to understanding and change.

- Berger and Luckmann (The Social Construction of Reality, 1966): Highlighted how shared meaning shapes social structures.
- Gergen's work on dialogical processes.
- Need to work on the past/problem first.

Examples:

- Narrative Practices in Participatory Narrative Inquiry or World Café foster shared understanding.
- Methods like Future Search rely on stakeholders co-constructing a desired future through dialogue.

Requisite Variety (Ashby's Law)

The complexity of the system's internal responses must match the complexity of the external environment it faces.

Variety and parallel processing

Everyone solves problems together

Implications for large group processes:

- Ensures diverse stakeholder participation to reflect the system's variety.
- Foundational in methods like Whole-Scale Change and Real-Time Strategic Change, which bring together cross-functional teams.

Socio-Technical Systems (STS) Theory

Developed by Trist and Emery at the Tavistock Institute, STS theory integrates social and technical elements in organisational design.

Key principles:

- Joint optimisation: both social (people, culture) and technical (processes, tools) systems must align.
- Participation: effective systems require those impacted to co-design solutions.

Applications in large group processes:

- Participative Design Workshops (PDW) explicitly apply STS principles in work redesign.
- Work-Out and Rapid Improvement Events draw on STS by involving employees in operational decision-making.

Action Research and Experiential Learning

Pioneered by Kurt Lewin, action research involves cycles of planning, acting, observing, and reflecting to solve problems collaboratively.

Experiential Learning: Kolb's Learning Cycle emphasises concrete experience, reflective observation, abstract conceptualisation, and active experimentation. Time compression and rapid feedback loops, iteration.

Applications in large group processes:

- Collaborative Development Action Inquiry (CDAI) integrates cycles of inquiry and action to foster systemic learning.
- SimuReal uses experiential modelling for scenario testing and learning.

Group dynamics

Group dynamics, rooted in Kurt Lewin's research, explores how individuals interact in group settings, influencing large group processes through behaviour, stages of development, and systemic roles.

Stages of Group Development (Tuckman, 1965): forming, storming, norming, performing
Triple Task Theory (Bion, 1948):

1. Focus on the objective (e.g. problem)
2. Group relationships
3. Emotional dynamics (Turquet)

Group-As-A-Whole (Tavistock):
understanding collective behaviours like scapegoating or groupthink.

Kenneth Gergen:
dialogue co-creates meaning and resolves conflict through shared understanding.

Values theory (Maslow, McGregor)

Gestalt/psychodynamic/Tavistock:

- Awareness of 'here-and-now' group dynamics (T-groups)
- Addressing relational and emotional patterns to build authenticity.
- 'Speaking for' or 'taking on roles for' the system.

Systems Thinking (Tavistock/NTL):
open systems theory informs boundary management and environmental interactions.

Examples:

- Deep Democracy: managing conflict by integrating minority perspectives.
- Open Dialogue & Art of Hosting: fostering inclusion and emotional safety.

Griffin et al: Bion, 1961, Bennis and Shepard, 1956, Lewin, 1951, Tuckman, 1965, Smith and Berg, 1987), and large group dynamics (Alford, 1989; Turquet, 1975; Pasmore and Fagans, 1992; Gilmore and Barnett 1992; Kreeger, 1975).

A dive into Clarkson's Group Imago

Provisional Group Imago

Initial stage: individuals enter the group with their own expectations and needs based on past experiences. Focus on establishing boundaries and understanding the group task

Adapted Group Imago

Members start to modify their initial expectations based on their interactions within the group. Characterized by conflict and testing of boundaries

Operative Group Imago

Group develops cohesion and shared norms. Members feel safer and are more invested in the group's future. Involves maximum game playing and reenacting family dynamics

Secondarily Adjusted Group Imago

Group functioning effectively with minimal interference from distracting group processes. Members achieve insight and engage in effective problem-solving

Clarified Group Imago

Group members saying goodbye and dealing with the grief of termination. Focus is on integrating the experiences and moving forward with a higher level of functioning.

Each stages has positive and negative behavioural possibilities.

Developed from Berne and Tuckman

Dialogue and Democratic Participation

Inspired by Habermas's work on communicative rationality and Bohm's principles of dialogue.

Core ideas:

- Effective change requires open, inclusive dialogue where all voices are valued.
- Decisions emerge from deliberative processes rather than imposed solutions.

Applications in large group processes:

- Citizen Assemblies exemplify democratic deliberation.
- Open Space Technology allows self-organised dialogue on pressing issues.
- Deep Democracy integrates all perspectives, particularly marginalised voices.

Ethics and power dynamics

Critical Systems Thinking (CST):

- Examines whose perspectives and values are privileged in decision-making (Flood and Jackson, 1991).
- Tools like Boundary Critique help surface power imbalances.

Power dynamics:

- Barry Oshry's power+systems explores how roles and systemic behaviours perpetuate inequalities.
- Also an example of experiential learning where ethics are a real issue!

Applications in large group processes:

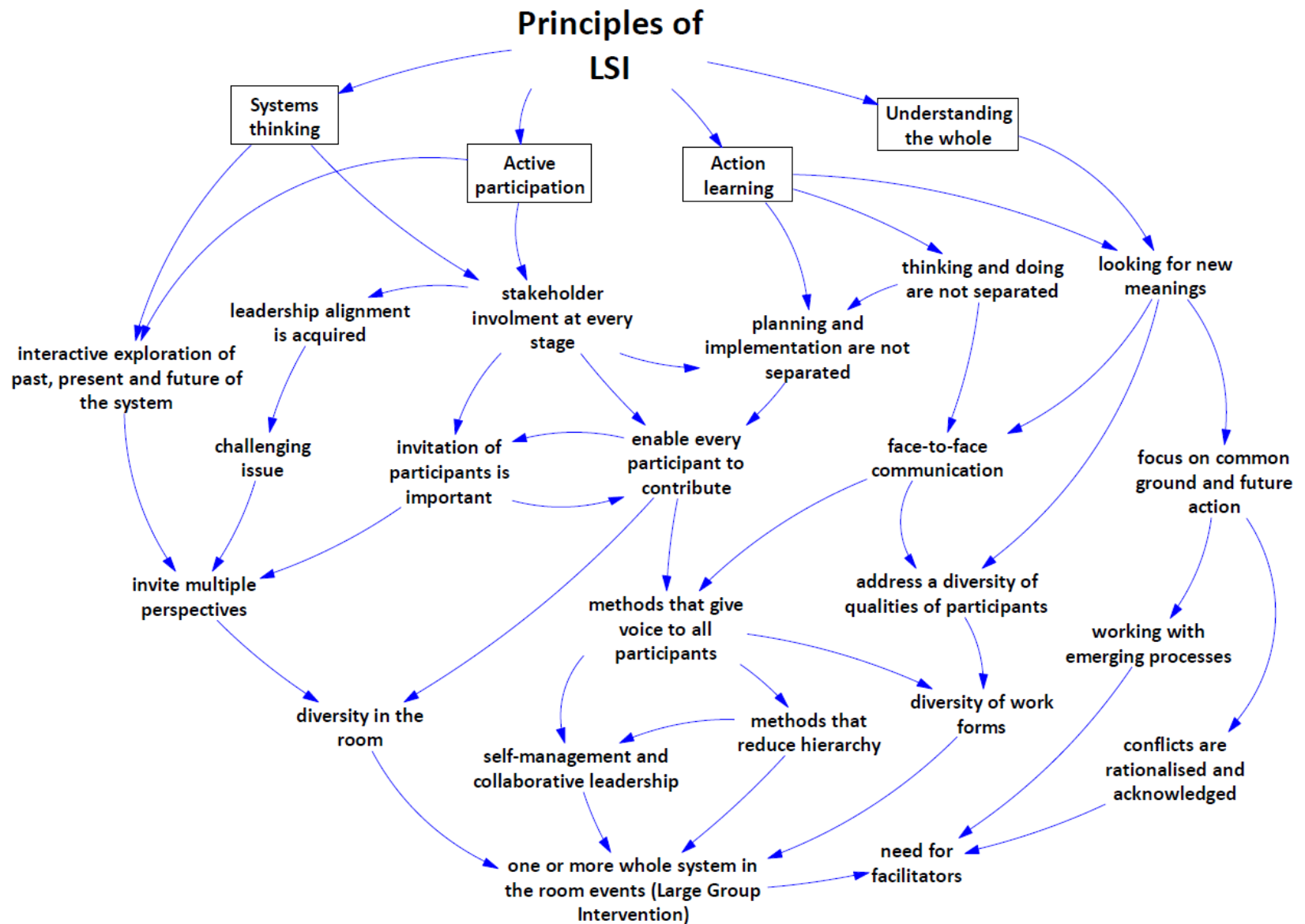
- World Café and Liberating Structures address inclusivity and equity.
- Methods like Pattern Languages aim to distribute power across participants.



The principles of large group processes are interconnected and mutually reinforcing, forming a robust foundation for enabling large-scale collaboration, systemic alignment, and adaptive change.

They attempt to ensure inclusivity, action orientation, and responsiveness to complexity.

KEY PRINCIPLES OF LARGE GROUP PROCESSES



Van der Zouwen: synthesis of how the principles of LSI produce the characteristics and the need for the whole system in the room events

Ten core principles

1. Whole system engagement
2. Systems thinking and interconnectedness
3. Common ground over conflict resolution
4. Creating a safe space for dialogue
5. Rapid prototyping and real-time decision-making
6. Aligning vision and action
7. Diversity and inclusion in design and participation
8. Fostering collective intelligence and learning
9. Self-management and participant ownership
10. Adaptivity and flexibility

Whole system engagement

Large group processes aim to include 'the whole system in the room,' ensuring diverse stakeholders are represented to reflect the complexity of the challenge.

- Encourages systemic understanding by breaking down silos and connecting diverse perspectives.
- Increases commitment and ownership of outcomes by involving all affected parties.

Systems thinking and interconnectedness

Large group processes treat organisations, communities, and problems as interconnected systems rather than isolated parts.

- Acknowledge and address feedback loops (e.g., reinforcing or balancing).
- Map interdependencies to identify leverage points (e.g., Participatory Systems Mapping).
- Systems thinking not merely a conceptual framework, but experienced directly as diverse groups redefine system boundaries through participation and co-creation

Applications in practice:

- Scenario Planning considers how multiple variables interact in future scenarios.
- Triple Task Approach integrates systems thinking into reflection, action, and engagement.

Common ground over conflict resolution

Many large group processes prioritise finding shared values, goals, and aspirations rather than focusing on resolving conflicts.

- Conflict as insight: methods like Deep Democracy and power+systems address systemic tensions and integrate minority perspectives into decision-making.
- Implications: balancing productive conflict with the search for alignment ensures deeper systemic engagement.

Creating a safe space for dialogue

Large group processes create environments where participants feel psychologically safe to share ideas, voice concerns, and engage authentically.

- Use of structured formats like Fishbowl Conversations to balance speaking and listening.
- Dialogical approaches like Open Dialogue foster mutual understanding.

Reduces defensiveness and increases openness to collaborative problem-solving.

Rapid prototyping and real-time decision-making

Large group processes condense months of work into short, intensive sessions, enabling rapid feedback loops and actionable results.

- Prototyping solutions during the session (e.g., in Design Thinking Workshops).
- Immediate prioritisation and action planning (e.g., in Rapid Improvement Events or GE Work-Outs).
- Enables organisations to act quickly in dynamic, complex environments.
- Builds momentum and avoids delays in implementation.

Aligning vision and action

Large group processes emphasise connecting high-level strategic vision with actionable steps.

- Methods like Hoshin Kanri cascade strategic goals into operational plans.
- Search Conferences focus on envisioning desired futures and co-creating pathways to achieve them.

Ensures alignment between diverse stakeholders and organisational priorities.

Diversity and inclusion in design and participation

Large group processes actively seek to include diverse voices, particularly those often marginalised or excluded.

Tools for inclusivity:

- Boundary Critique (Critical Systems Heuristics) ensures decisions consider what is included/excluded in the system.
- Polarity Management balances competing needs to include multiple perspectives.

Examples in practice:

- World Café encourages equal participation in informal conversations.
- Warm Data Labs focuses on relational diversity to understand complex interdependencies.

Fostering collective intelligence and learning

Large group processes leverage the knowledge, experience, and creativity of diverse participants to generate innovative solutions.

- Meta-Planning for structured idea generation and prioritisation.
- Collaborative Development Action Inquiry (CDAI) for iterative reflection and action.

Unlocks the potential of groups to think beyond individual or siloed perspectives.

Self-management and participant ownership

Large group processes empower participants to take responsibility for their contributions and the outcomes of the process.

- Reduces dependency on facilitators and fosters creativity.
- Strengthens collaborative decision-making and action.

Examples in practice:

- Open Space Technology (OST) relies on participants creating their own agendas.
- Art of Hosting uses participatory leadership techniques to distribute ownership across the group.

Adaptability and flexibility

Large group processes balance predefined structures with flexibility to adapt to participants' emerging needs.

- Liberating Structures and Warm Data Labs allow emergent solutions to arise in real time.
- Participatory Narrative Inquiry adapts its process to the stories participants share.

Responds effectively to complexity and avoids rigid imposition of solutions.

Reflection

- Which of these principles align with my systems practice intervention?
- Which are most challenging in practice?



CLASSIFICATION AND ENUMERATION OF LARGE GROUP PROCESSES



CLASSIFICATION OF LARGE GROUP PROCESSES

My breakdown: complexity type, focus

Complexity types

(Grammar of Systems, Hoverstadt):

- Perceptual complexity: methods addressing mental models, shared perspectives, and cognitive alignment.
- Structural complexity: methods targeting systemic interdependencies, roles, and organisational design.
- Dynamic complexity: methods that respond to adaptive, fast-changing systems requiring real-time collaboration.

Focus areas:

- Visioning and alignment: long-term thinking, shared vision creation.
- Solutions design: practical problem-solving and process innovation.
- Emergent change: adaptive and responsive collaboration for system transformation.

Other classifications

Holman and Devane (1999)

- Planning methods to help set a direction
- Structuring methods to redefine working relationships and create new structures
- Adaptable methods that vary, including planning, structuring, and other.

Bunker and Alban (1997)

- for creating the future
- for work redesign
- for discussion and decision-making.

By methodological structure

- Structured methods: predefined steps, clear facilitation
- Emergent methods: flexible, responsive to participant needs
- Technology-enabled methods

Significant input from Jack Martin Leith

By process intent

- Exploration and sense-making: focusing on understanding systems and trends
- Planning and design: co-creating strategies or organisational solutions
- Implementation and action

By context of application

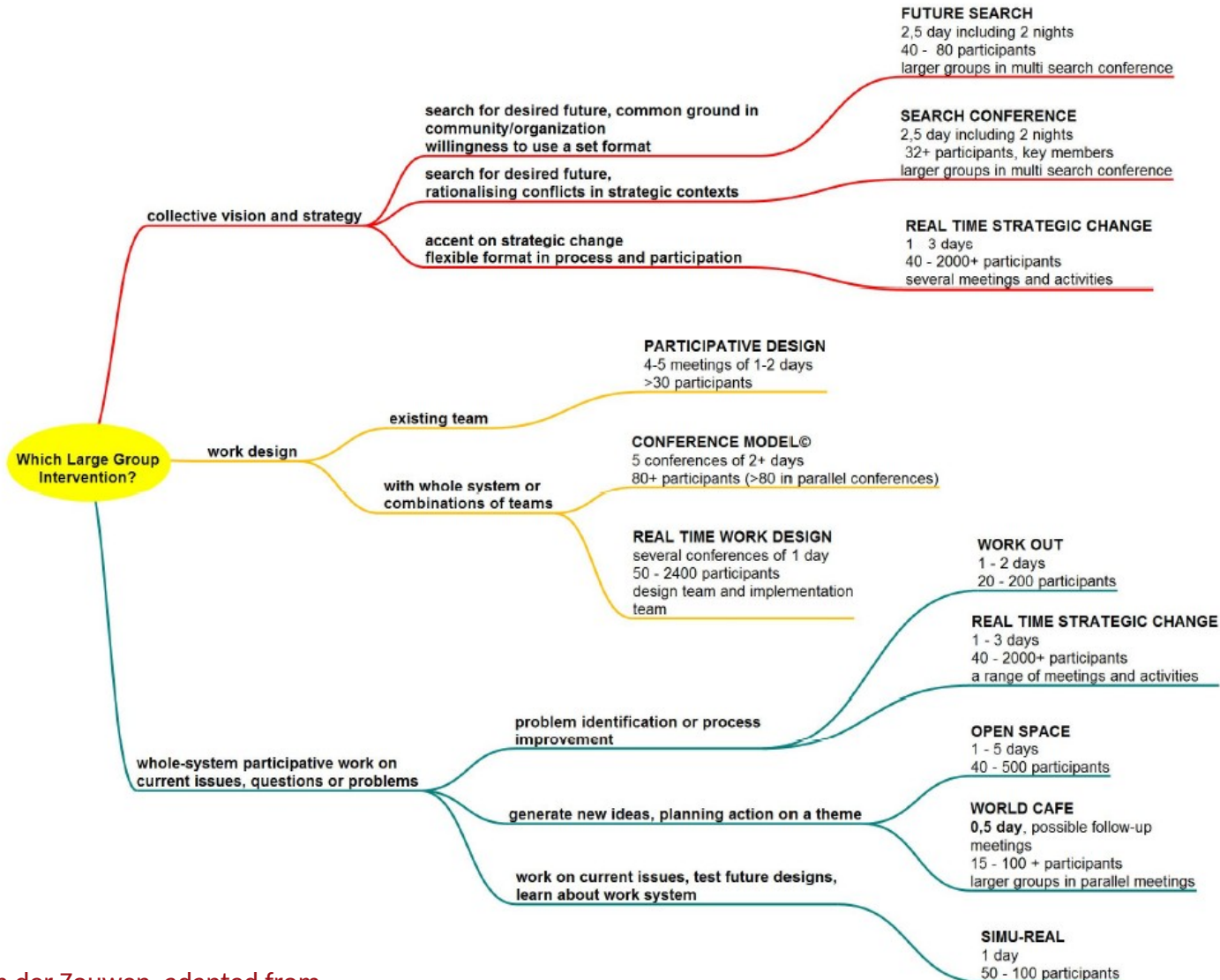
- Organisational strategy and change
- Community development
- Policy development

By participant dynamics

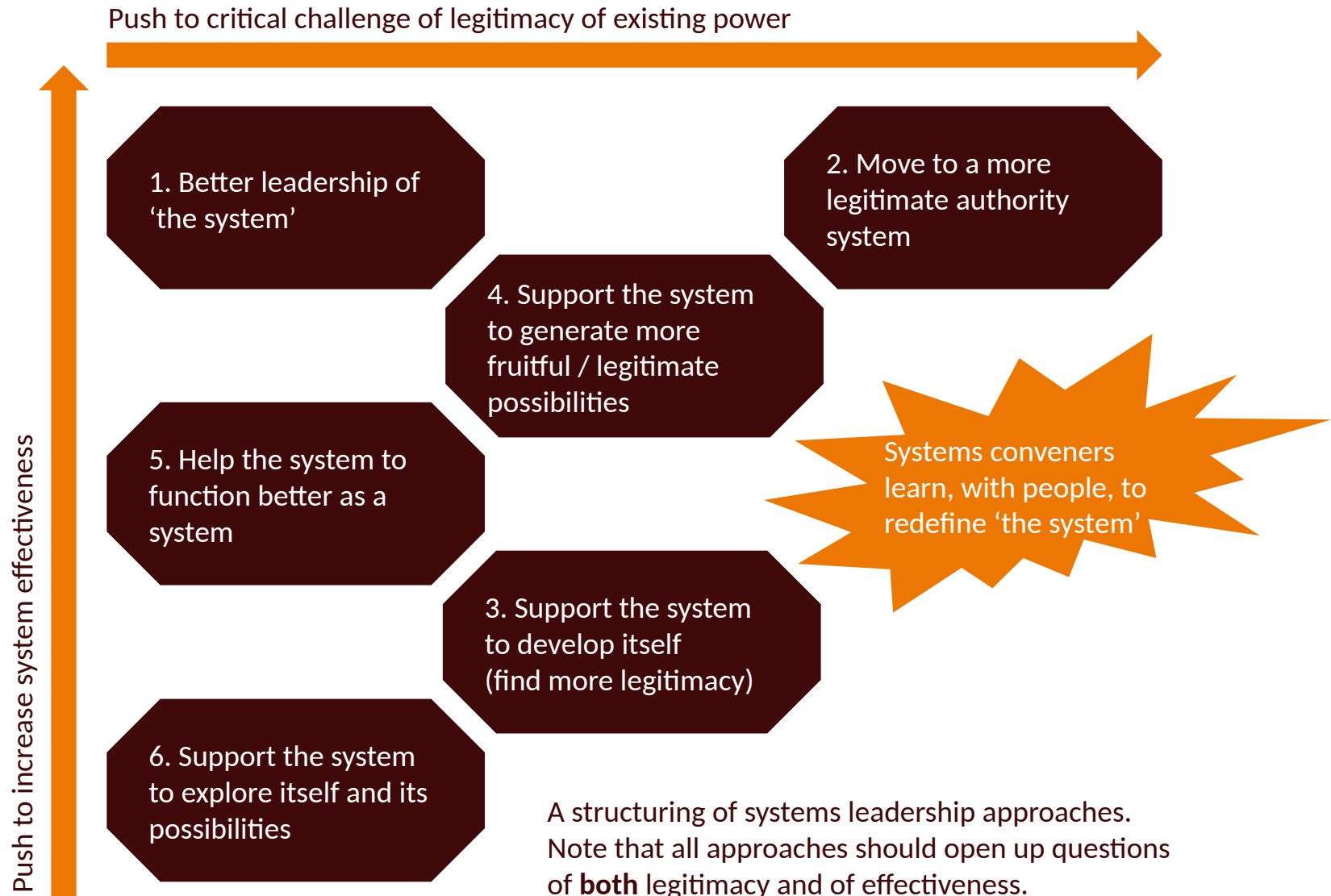
- Whole-system inclusion: involves diverse stakeholders for systemic change
- Self-organised and participant-led: participants take control of discussions and outcomes
- Facilitator-driven

	Complexity	Focus	Methodological Rigour	Process Intent	Participant Dynamics	Context
Future Search	Perceptual	Visioning and Alignment	Structured	Planning and Design	Whole-System Inclusion	Organisational Strategy
Scenario Planning	Perceptual	Visioning and Alignment	Structured	Exploration and Sense-Making	Facilitator-Driven	Policy Development
TIP – The Integral Process	Perceptual	Visioning and Alignment	Emergent	Exploration and Sense-Making	Facilitator-Driven	Complex Problem Solving
Cognitive Edge Methods	Perceptual	Solutions Design	Emergent	Exploration and Sense-Making	Whole-System Inclusion	Organisational Learning
Polarity Management	Perceptual	Solutions Design	Structured	Problem-Solving	Facilitator-Driven	Organisational Dynamics
Citizen Assemblies and Variants	Perceptual	Solutions Design	Structured/Facilitator-Driven	Policy Making	Whole-System Inclusion	Policy Development
Art of Hosting	Perceptual	Emergent Change	Emergent	Implementation	Self-Organised	Community Development
Deep Democracy	Perceptual	Emergent Change	Facilitator-Driven	Problem-Solving	Whole-System Inclusion	Conflict Resolution
Gurteen Knowledge Café	Perceptual	Emergent Change	Emergent	Sense-Making	Self-Organised	Knowledge Sharing
Real-Time Strategic Change (RTSC)	Structural	Visioning and Alignment	Structured	Implementation	Whole-System Inclusion	Organisational Strategy
Hoshin Kanri	Structural	Visioning and Alignment	Structured	Planning and Design	Facilitator-Driven	Operations
Rapid Improvement Events / Work-Out	Structural	Solutions Design	Structured	Implementation	Whole-System Inclusion	Process Improvement
Participatory Innovation Model	Structural	Solutions Design	Emergent	Problem-Solving	Facilitator-Driven	Innovation
Triple Task Approach	Structural	Emergent Change	Emergent	Implementation	Whole-System Inclusion	Organisational Learning
GroupWorks Patterns	Structural	Emergent Change	Emergent	Problem-Solving	Self-Organised	Facilitation
Interactive Planning	Dynamic	Visioning and Alignment	Structured	Planning and Design	Facilitator-Driven	Strategy and Innovation
Search Conference	Dynamic	Visioning and Alignment	Structured	Exploration and Sense-Making	Whole-System Inclusion	Community Development
Liberating Structures	Dynamic	Solutions Design	Emergent	Problem-Solving	Self-Organised	Innovation
Fast Cycle Full Participation	Dynamic	Solutions Design	Structured	Implementation	Whole-System Inclusion	Rapid Strategy Alignment
Warm Data Labs	Dynamic	Emergent Change	Emergent	Exploration and Sense-Making	Self-Organised	Systems Exploration
Collaborative Development Action Inquiry (CDAI)	Dynamic	Emergent Change	Emergent	Implementation	Facilitator-Driven	Organisational Transformation
Power+Systems TOOTs	Dynamic	Emergent Change	Structured	Exploration and Sense-Making	Facilitator-Driven	Leadership Development
Theory U	Dynamic	Emergent Change	Emergent	Exploration and Sense-Making	Facilitator-Driven	Leadership Transformation
Social Presencing Theatre etc	Dynamic	Emergent Change	Emergent	Implementation	Self-Organised	Systems Change

Overview of the LSI family



Compare: systems leadership



All approaches (71) – featured, mentioned

	Visioning and alignment	Solutions design	Emergent change
Perceptual complexity	Future Search <i>Three Horizons etc</i> <i>Scenario Planning</i> <i>TIP – The Integral Process</i> Preferred Futuring Delphi Method Stakeholder mapping ICA Strategic Planning Process Participatory Narrative Inquiry Causal Layered Analysis (CLA)	Soft Systems Methodology <i>Cognitive Edge methods</i> <i>Polarity Management</i> <i>Citizen Assemblies and variants</i> AmericaSpeaks 21st Century Town Meeting Meta-Planning Converge-diverge model	Open Space Technology (OST) <i>Art of Hosting</i> <i>Deep Democracy</i> <i>Gurteen Knowledge Café</i> ProAction Café Open Dialogue Storytelling and narrative practices Fishbowl Conversations
Structural complexity	Whole-Scale™ Change <i>Real-Time Strategic Change (RTSC)/</i> <i>Real-Time Work Design</i> <i>Hoshin Kanri</i> Axelrod Conference Model® Participatory Systems Mapping Strategic Change Accelerator (IBM ACT) Whole Systems Approach Viable Systems Model facilitation Boundary Critique (Critical Systems Heuristics)	M&G Taylor Method/ Accelerator/DesignShop Consensus Workshop Method <i>Rapid Improvement Events /</i> <i>GE Work-Out etc</i> <i>Participatory Innovation Model</i> Gemba Kaizen Design Charrettes Value Stream Mapping Cross-Impact Analysis GameStorming Participatory/Community Mapping Participatory budgeting	The Organization Workshop Participative Design Workshops (PDW) <i>Triple Task Approach</i> <i>GroupWorks Patterns</i> Pattern Language for Large Groups Generative Scribing
Dynamic complexity	Appreciative Inquiry (AI) Summit <i>Interactive Planning</i> <i>Search Conference</i> <i>Large-Scale Interactive Process (LSIP)</i> Future Back Planning Scenario Narratives	Problem Solving Team Build/MacDonald Team Discipline Breaking the Shell <i>Liberating Structures</i> <i>Fast Cycle Full Participation</i> Think Like a Genius Technology of Participation (ToP) SimuReal Design Thinking Workshops	Syntegration/Team Syntegrity When Cultures Meet/Encounters With The Other <i>Constellations</i> <i>People Need People / Warm Data Labs</i> <i>World Café</i> <i>Collaborative Development Action Inquiry (CDAI)</i> <i>Power+Systems TOOTs</i> <i>Theory U</i> <i>Social Presencing Theatre etc</i> Circle Methodology Collaborative Leadership Development Strategic Forum Systemic Design

Main featured approaches (16)

	Visioning and alignment	Solutions design	Emergent change
Perceptual complexity	Future Search	Soft Systems Methodology	Open Space Technology (OST)
Structural complexity	Whole-Scale™ Change Whole Systems Approach Real-Time Strategic Change (RTSC)/Real-Time Work Design Axelrod Conference Model®	M&G Taylor Method/Decision Accelerator Consensus Workshop Method	The Organization Workshop Participative Design Workshops (PDW)
Dynamic complexity	Appreciative Inquiry (AI) Summit	Problem Solving Team Build/MacDonald Process Breaking the Shell	World Café When Cultures Meet/Encounters With The Other

Other interesting approaches mentioned (21)

	Visioning and alignment	Solutions design	Emergent change
Perceptual complexity	Three Horizons Scenario Planning TIP – The Integral Process	Cognitive Edge methods Polarity Management Citizen Assemblies and variants	Art of Hosting Deep Democracy Gurteen Knowledge Café
Structural complexity	Real-Time Strategic Change (RTSC) / Real-Time Work Design Hoshin Kanri	Rapid Improvement Events / GE Work-Out etc Participatory Innovation Model	Triple Task Approach GroupWorks Patterns
Dynamic complexity	Interactive Planning Search Conference Large-Scale Interactive Process (LSIP)	Liberating Structures Fast Cycle Full Participation	Warm Data Labs Collaborative Development Action Inquiry (CDAI) Power+Systems TOOTs Theory U Constellations Social Presencing Theatre etc

Other approaches not featured (34)

	Visioning and alignment	Solutions design	Emergent change
Perceptual complexity	Preferred Futuring Delphi Method Stakeholder mapping ICA Strategic Planning Process Participatory Narrative Inquiry Causal Layered Analysis (CLA)	AmericaSpeaks 21st Century Town Meeting Meta-Planning Converge-diverge model	ProAction Café Open Dialogue Storytelling and narrative practices Fishbowl Conversations
Structural complexity	Participatory Systems Mapping Strategic Change Accelerator (IBM ACT) Viable Systems Model facilitation Boundary Critique (Critical Systems Heuristics)	Gemba Kaizen Design Charrettes Value Stream Mapping Cross-Impact Analysis GameStorming Participatory/Community Mapping Participatory budgeting	Pattern Language for Large Groups Generative Scribing
Dynamic complexity	Future Back Planning Scenario Narratives	Think Like a Genius Technology of Participation (ToP) SimuReal Design Thinking Workshops	Circle Methodology Collaborative Leadership Development Strategic Forum Systemic Design

Known gaps in my focus

- Sector-specific approaches: for example, Participatory Rural Appraisal (PRA) in development contexts, or charrettes for urban planning.
- Emerging digital methods and codesign tools: virtual collaborative tools like Miro, MURAL, or online participatory workshops using Zoom-integrated platforms.
- Global indigenous practices: such as talking circles, Ubuntu Circles or collective wisdom processes inspired by non-Western traditions.
- Hackathons.
- Barcamp, unconferences.
- Religious practices.
- Transition design.
- Many more futures methods (Griffin et al have Lippitt, 1983, Schlinder-Rainman and Lippitt, 1980)
- Simulations.
- Peace-making and conflict resolution, e.g. Conflict Transformation Circles, Facilitated Power Analysis.
- Additional public engagement/governance approaches.
- Interpersonal approaches which border on small-group, e.g. Circling, T-Groups, Encounter groups and other socio-dynamic and group therapeutic processes. Also scrum, mob programming etc.
- Cultish (?) processes – EST, Landmark Trust, Tony Robbins workshops.
- Embodied and somatic approach beyond Theatre of the Oppressed.
- Ritual practices.
- Other innovation / open innovation / product and service design approaches.



OVERVIEW OF FEATURED APPROACHES

Perceptual complexity

Visioning and alignment

Featured

- Future Search: Shared visioning through diverse perspectives.

Mentioned

- Three Horizons / Berkana Two Loops / Panarchy Adaptive Cycle: Visualising system-level transitions. (Two Loops more relational and community-focused, Adaptive Cycle more ecological resilience perspective)
- Scenario Planning: Long-term scenario exploration.
- TIP - The Integral Process for Working on Complex Issues (Sara Nora Ross): Integrates multiple perspectives and layers of complexity, using developmental approaches to clarify and align on shared issues and goals.

Solutions design

Featured

- Soft Systems Methodology (SSM): designing responses to messy, ill-defined problems.

Mentioned

- Cognitive Edge Methods: Narrative-driven sense-making.
- Polarity Management: managing conflicting yet interdependent priorities.
- Citizen Assemblies: structured or semi-structured forums that bring together a representative sample of citizens to deliberate on complex societal issues. Variants include Citizens' Juries (smaller, more focused deliberations) and Deliberative Polling (combining surveys with structured deliberation to gauge informed public opinion).

Emergent change

Featured

- Open Space Technology (OST): Self-organised exploration.

Mentioned

- Art of Hosting: Collaborative, emergent design.
- Deep Democracy (Lewis Method): integrating minority perspectives to resolve conflicts.
- Gurteen Knowledge Café: Informal conversations for knowledge sharing.

Structural complexity

Visioning and alignment

Featured

- Whole-Scale™ Change – a variant of RTSC for structural alignment.

Mentioned

- Real-Time Strategic Change (RTSC)/Real-Time Work Design: Aligning organisation-wide strategies.
- Hoshin Kanri: aligning goals across organisational levels.

Featured

- M&G Taylor Method/Decision Accelerator/DesignShop: Immersive design for complex decision-making.
- Consensus Workshop Method: Structured consensus-building.

Mentioned

- Rapid Improvement Events / GE Work-Out etc – work-based process improvement with streamlined decision-making and empowered teams.
- Participatory Innovation Model

Emergent change

Featured

- Participative Design Workshops (PDW): Employee-led structural redesign.
- Organisation Workshop: Self-management and teamwork.

Mentioned

- GroupWorks Patterns: Frameworks for group design.
- Triple Task Approach: Balancing action, reflection, and group engagement.

Solutions design

Dynamic complexity

Visioning and alignment

Featured

- Appreciative Inquiry (AI) Summit: Vision-driven adaptability.

Mentioned

- Interactive Planning: Continuous scenario planning.
- Search Conference: Goal alignment and emergent action.
- Large-Scale Interactive Process (LSIP): Real-time emergent collaboration.

Solutions design

Featured

- Problem Solving Team Build/MacDonald Team Discipline: a structured team-building method that enhances collaboration and problem-solving efficiency in organisations by aligning group dynamics.
- Breaking the Shell: identifying and

planning to overcome barriers to success in a psychodynamic way.

Mentioned

- Liberating Structures: Iterative creativity.
- Fast Cycle Full Participation: high-speed collaborative decision-making

Emergent change

Featured

- Syntegration/Team Syntegrity: a cybernetic approach to collaborative decision-making.
- When Cultures Meet/Encounters With The Other: Dialogue for cultural understanding.

Mentioned

- World Café: Structured conversations for adaptive action.
- Power+Systems TOOTs: Cultural behavioural exploration

- Theory U: deep sensing, connection, and prototyping transformative actions.
- Constellations: a systemic approach that visually and spatially maps relationships, dynamics, and patterns within a system to uncover hidden connections and resolve underlying tensions, fostering transformation.
- People Need People / Warm Data Labs (Nora Bateson): a relational process for exploring interdependencies and systemic complexity through conversational inquiry, fostering deep understanding and adaptive collective responses.
- Collaborative Development Action Inquiry (CDAI) (Torbert): combines reflective practice, dialogue, and action to foster organisational learning and transformation through iterative cycles of inquiry.



OVERVIEW OF OTHER APPROACHES

Perceptual complexity – other approaches

Visioning and alignment

- Preferred Futuring: Narrative-based strategic alignment.
- Delphi Method: consensus-building for long-range forecasting.
- Stakeholder Mapping: visualising and prioritising stakeholder relationships.
- Participatory Narrative Inquiry: collects and analyses stories to make sense of complex systems and uncover hidden dynamics.
- Causal Layered Analysis (CLA): a futures method that explores multiple layers of understanding, from surface problems to underlying cultural myths and worldviews.

Solutions design

- AmericaSpeaks: Structured participatory deliberation.
- 21st Century Town Meeting: Structured participatory deliberation.
- Meta-Planning: Idea generation and prioritisation.
- Converge-Diverge Model: a structured process for guiding groups through phases of idea divergence (exploration and creativity) and convergence (prioritisation and decision-making).

- ProAction Café: Structured conversations.
- Open Dialogue: Inclusive listening and understanding.
- Storytelling and Narrative Practices: sense-making and fostering shared meaning through narrative.
- Fishbowl Conversations: rotating participant discussions with observer roles.

Emergent change

Structural complexity – other approaches

Visioning and alignment

- Whole Systems Approach: a holistic framework for aligning systems thinking with group engagement.
- Axelrod Conference Model® : Multi-event redesign process.
- Participatory Systems Mapping: Mapping interdependencies.
- Strategic Change Accelerator (IBM ACT): Adaptation-focused design and alignment.
- VSM Facilitation: diagnosing and redesigning organisational structures for viability.
- Boundary Critique (Critical Systems Heuristics): a systems thinking approach that examines boundary judgments to reveal what is included or excluded in decision-making.

Solutions design

- Gemba Kaizen: Lean process optimisation.
- Value Stream Mapping: streamlining workflows and eliminating inefficiencies.
- Design Charrettes: co-creating solutions collaboratively with diverse stakeholders.
- Cross-Impact Analysis: exploring interdependencies between actions and their potential impacts.
- Cross-Impact Analysis: exploring interdependencies between actions and their potential impacts.
- Participatory Budgeting: enables communities to decide how to allocate parts of a public budget, fostering inclusivity in financial decision-making.
- Participatory/Community Mapping – visual co-creation of community relationships.

Emergent change

- Pattern Language for Large Groups: A meta-framework for facilitating any large-group process.
- Generative Scribing: visual facilitation that captures group dynamics and key insights in real time, fostering shared understanding.

Dynamic complexity – other approaches

Visioning and alignment

- Future Back Planning: envisioning a desired future and planning backwards.
- Scenario Narratives: exploring multiple future pathways to enhance decision-making.
- Thinking Like a Genius: Adaptive brainstorming.
- Technology of Participation (ToP): Multi-step facilitation processes.
- SimuReal: Real-time scenario modelling.
- Design Thinking Workshops: collaborative sessions focused on iterative problem-solving, using empathy, rapid prototyping, and feedback loops, for user-centred challenges and innovation.
- Strategic Forum: structured stakeholder engagement for cultural and strategic shifts.
- Circle Methodology: inclusive dialogue and collective group healing.
- Collaborative Leadership Development: building systemic leadership for transformative change.
- Systemic Design: combining systems thinking with participatory methods.
- Social Presencing Theatre, Legislative Theatre, Theatre of the Oppressed etc: a body-based approach to exploring systems change and sensing the dynamics of social systems.

Solutions design

Emergent change

Antlerboy's Large Group Process Mentor

- A trained, dedicated ChatGPT
- You will need an account to access – not, I think, a paid account
- Play around with this and look at the selection of different approaches in particular
- Feedback very welcome

link.redquadrant.com/ChatGPTlargegroupprocessmentor



MAIN FEATURED APPROACHES

Appreciative Inquiry (AI) summit

Perceptual complexity, visioning and alignment

- A collaborative approach that focuses on identifying and leveraging an organization's strengths to envision and achieve a desired future.
- Use in strategic planning, organizational development, cultural transformation.
- Developed in the 1980s by David Cooperrider and Suresh Srivastva at Case Western Reserve University. Still practiced globally.
- Emergent and adaptive: flexible process that adapts to the organization's context, emphasizing positive inquiry, storytelling.
- Key steps: the 4-D Cycle
 1. Discover: Identify organizational strengths.
 2. Dream: Envision a desired future.
 3. Design: Co-construct the ideal organization.
 4. Destiny: Implement and sustain the vision.



- Whole-system inclusion: engages all organizational levels to co-create the future.
- Example: Inclusive summits where diverse stakeholders share success stories and envision the future, used by companies like British Airways and the U.S. Navy for cultural transformation.
- Focuses on positive aspects rather than problem-solving. Encourages storytelling to build a shared vision.

Problem Solving



"Felt Need" Identification of Problem



Analysis of Causes



Analysis and Possible Solutions



Action Planning (Treatment)



Basic Assumption: An Organization Is a Problem to Be Solved

Appreciative Inquiry



Appreciating and Valuing the Best of "What Is"



Envisioning "What Might Be"



Dialoguing "What Should Be"



Basic Assumption: An Organization Is a Mystery to Be Embraced

Future Search

Perceptual complexity, visioning and alignment

- A planning meeting that brings a cross-section of stakeholders together to create a shared vision for the future.
- Uses include community development, strategic planning, organizational change.
- Developed in the 1980s by Marvin Weisbord and Sandra Janoff; used worldwide.
- Structured: follows an agenda over several days, focusing on past, present, and future analyses. Uses timelines and mind maps to explore shared histories and future possibilities.
- Whole-system inclusion: Involves all relevant stakeholders to ensure diverse perspectives. Mixed small groups discuss critical issues, ensuring varied viewpoints.
- Key steps or phases
 1. Review the past: create a shared timeline.
 2. Explore the present: identify trends and current realities.
 3. Create ideal future scenarios: envision desired outcomes.
 4. Identify common ground: find shared goals.
 5. Plan actions: develop actionable steps.
- Emphasises finding common ground over conflict resolution.
- Encourages systems thinking by examining the whole picture.
- Example applications: applied in urban planning initiatives and corporate strategic sessions.

FUTURE SEARCH CONFERENCE

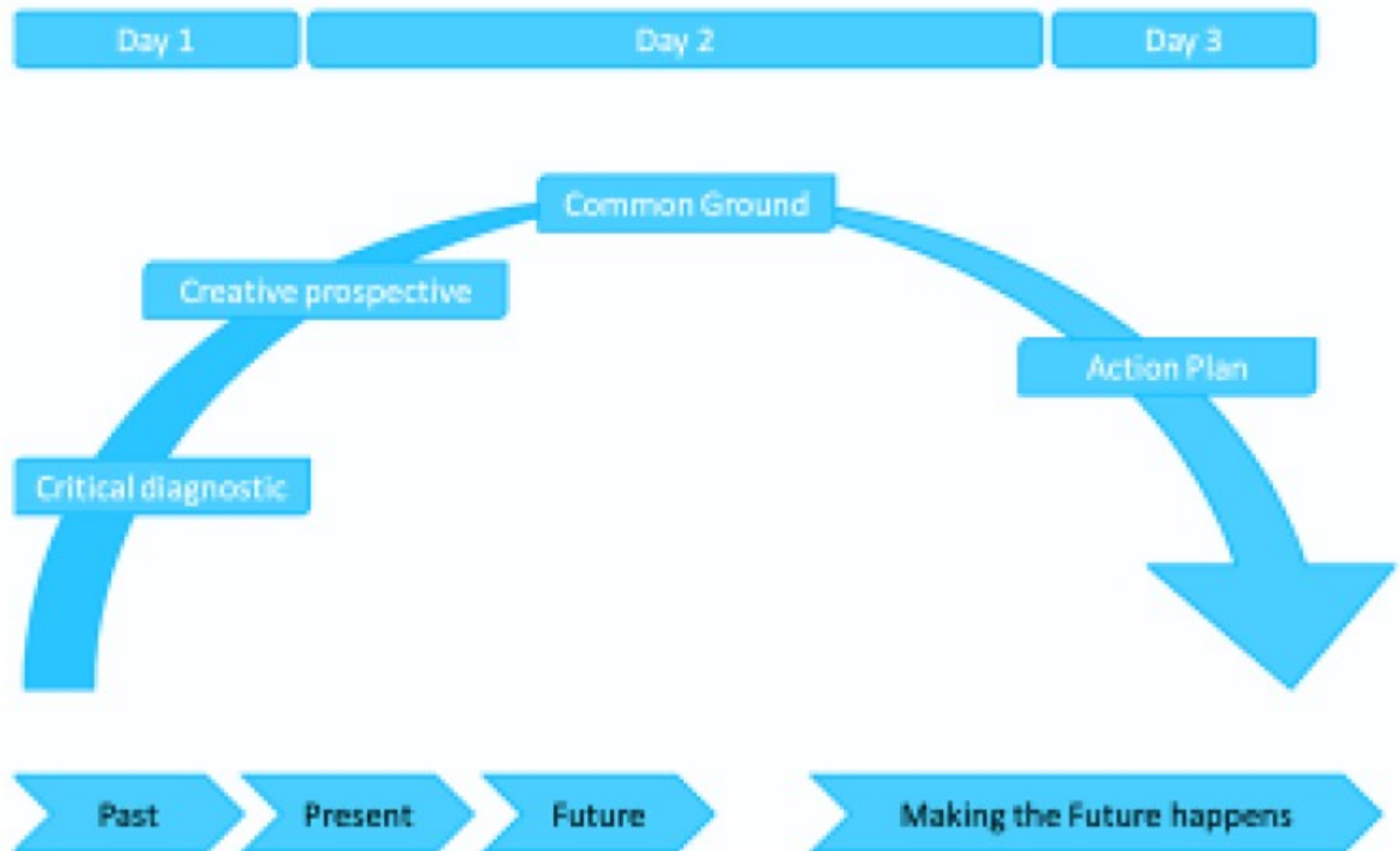
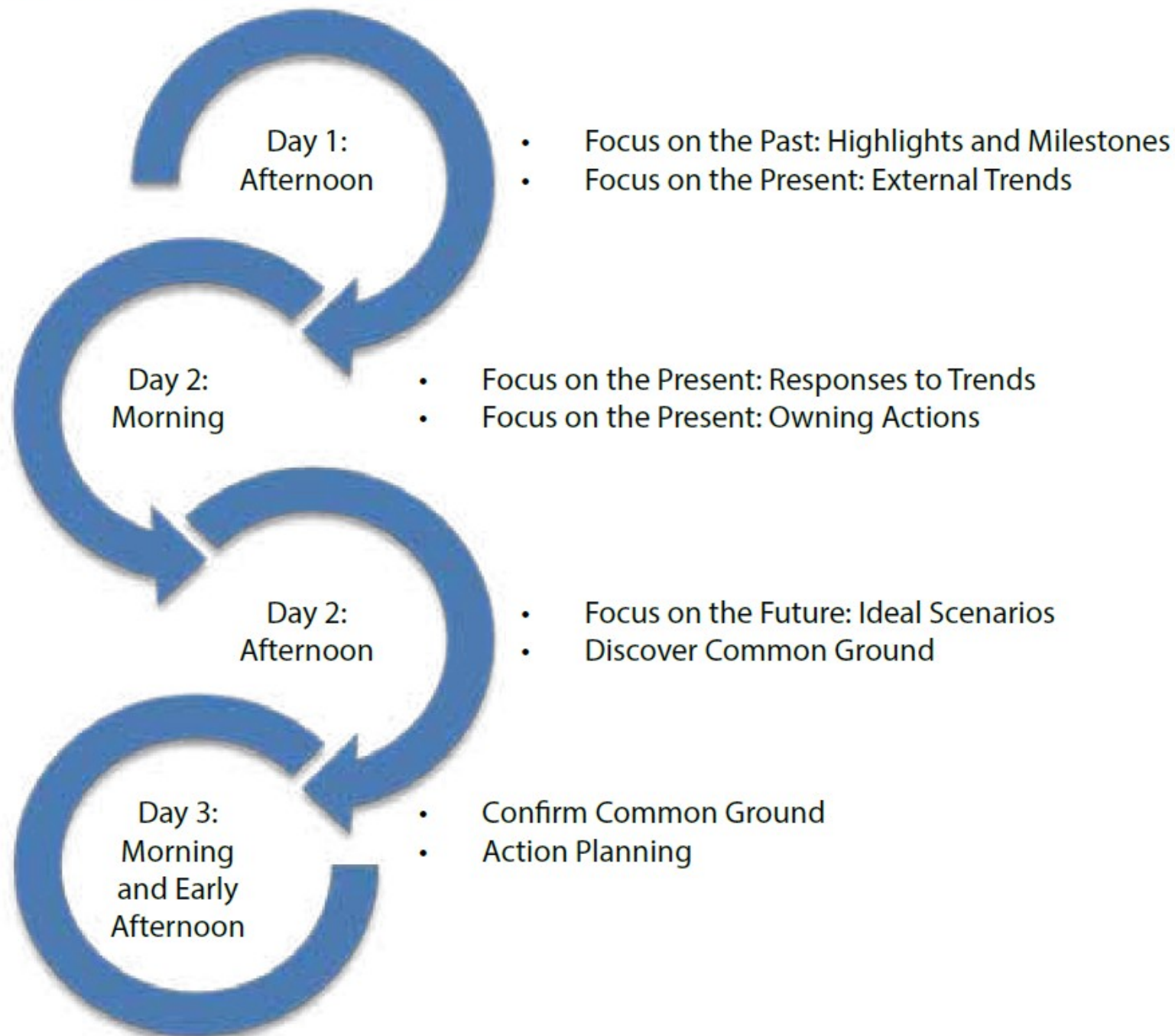
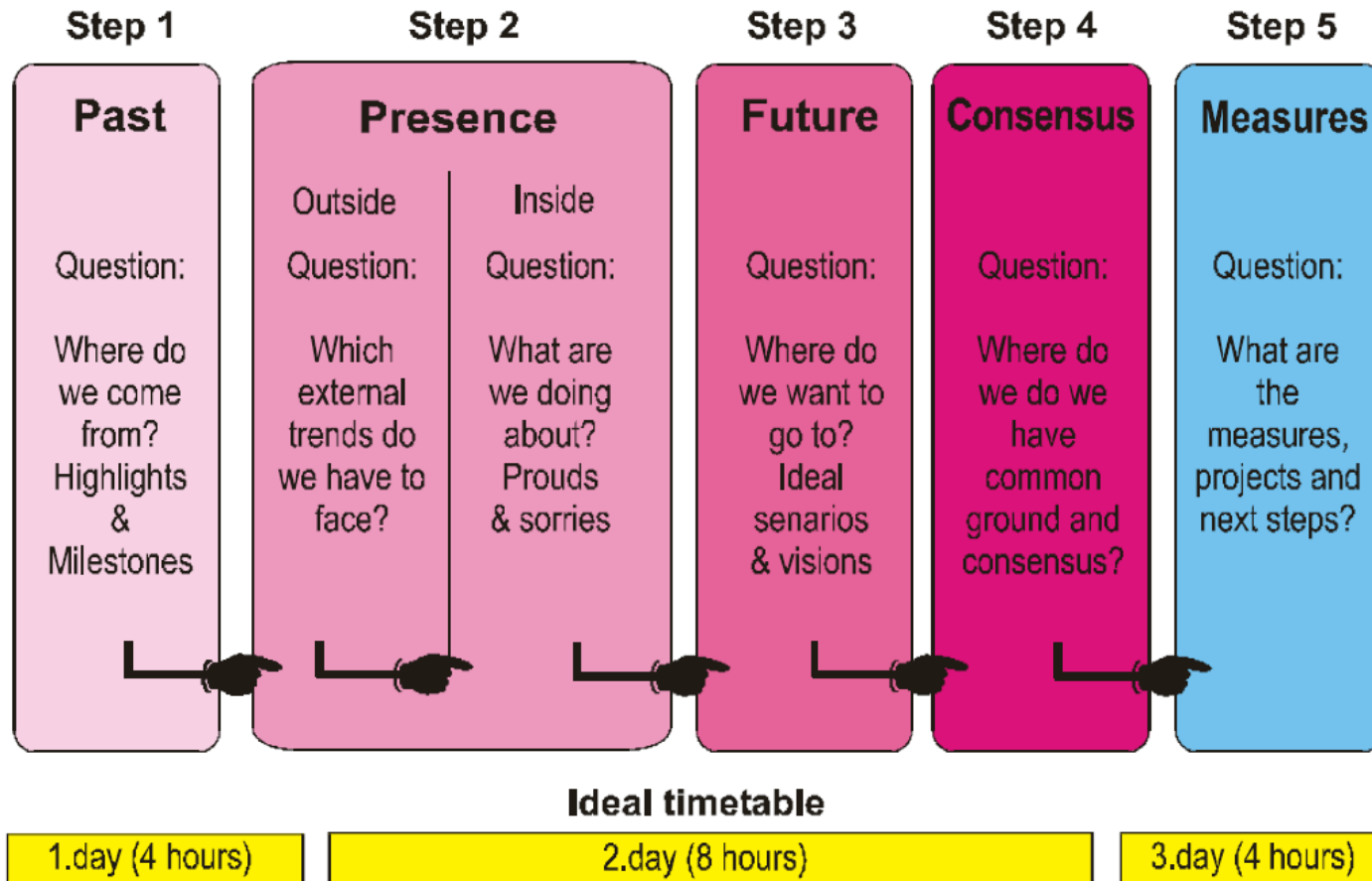


Figure: A Typical Future Search Agenda



Steps of a Future Search Conference



Jansen's Four Rooms of Change / Four Room Apartment

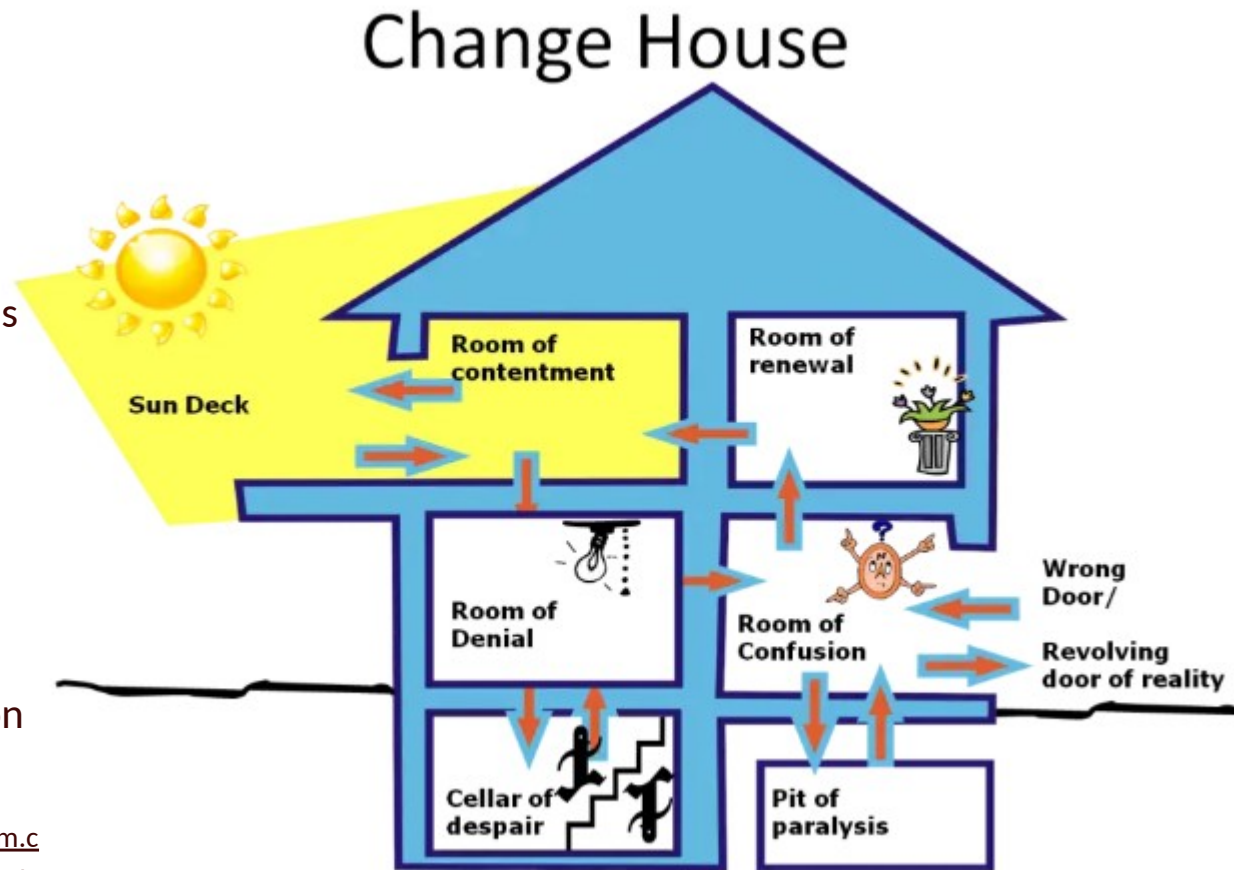
Original model:

- Contentment – no change need or demand
- Denial – defensive, but pressure continues
- Confusion – between worlds
- Renewal – possibilities

(Ashridge additions – potential distractions):

- Sun deck – pause, potential future, more denial
- Despair – denial. no action
- Paralysis – stuck in confusion
- Door – testing in reality...

Modern version: thevirtualtrainingteam.com/articles/change-management-models-the-change-house/

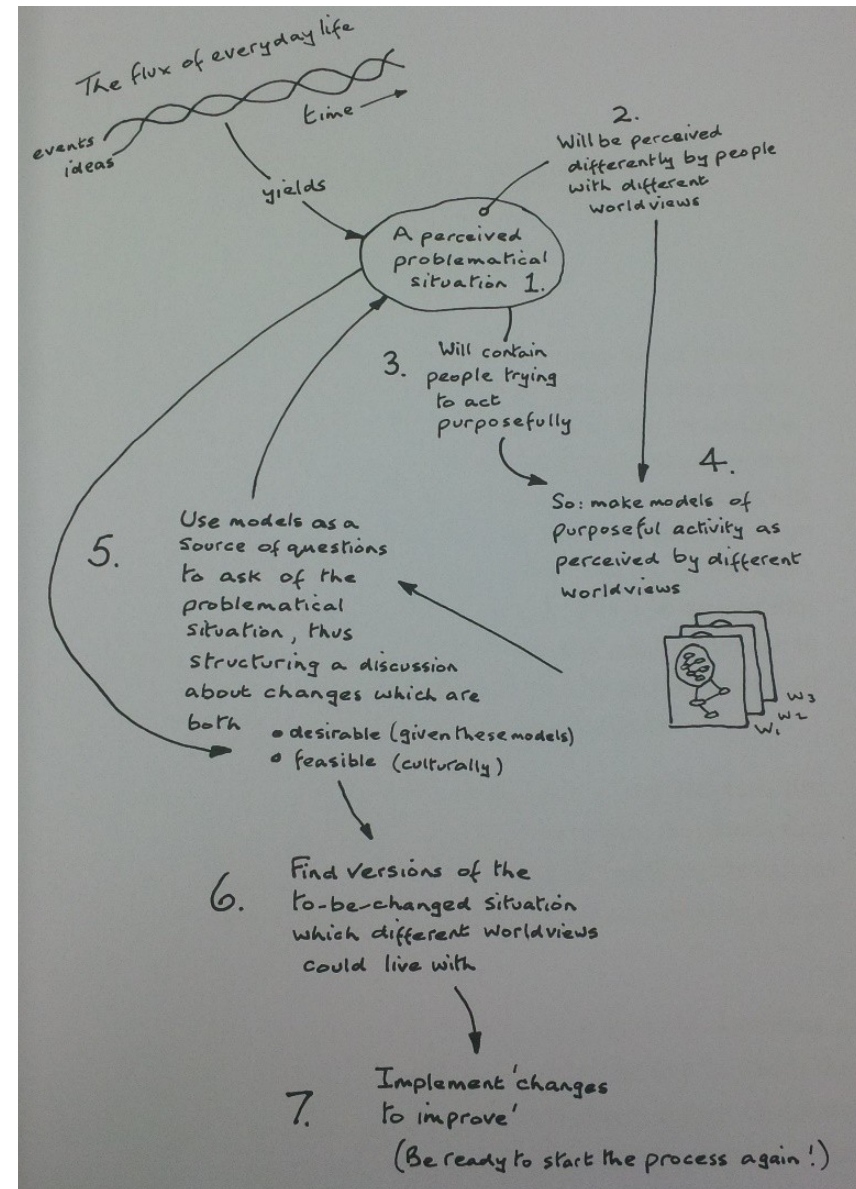


Yes/no model from original book: link.redquadrant.com/Jansenyesno

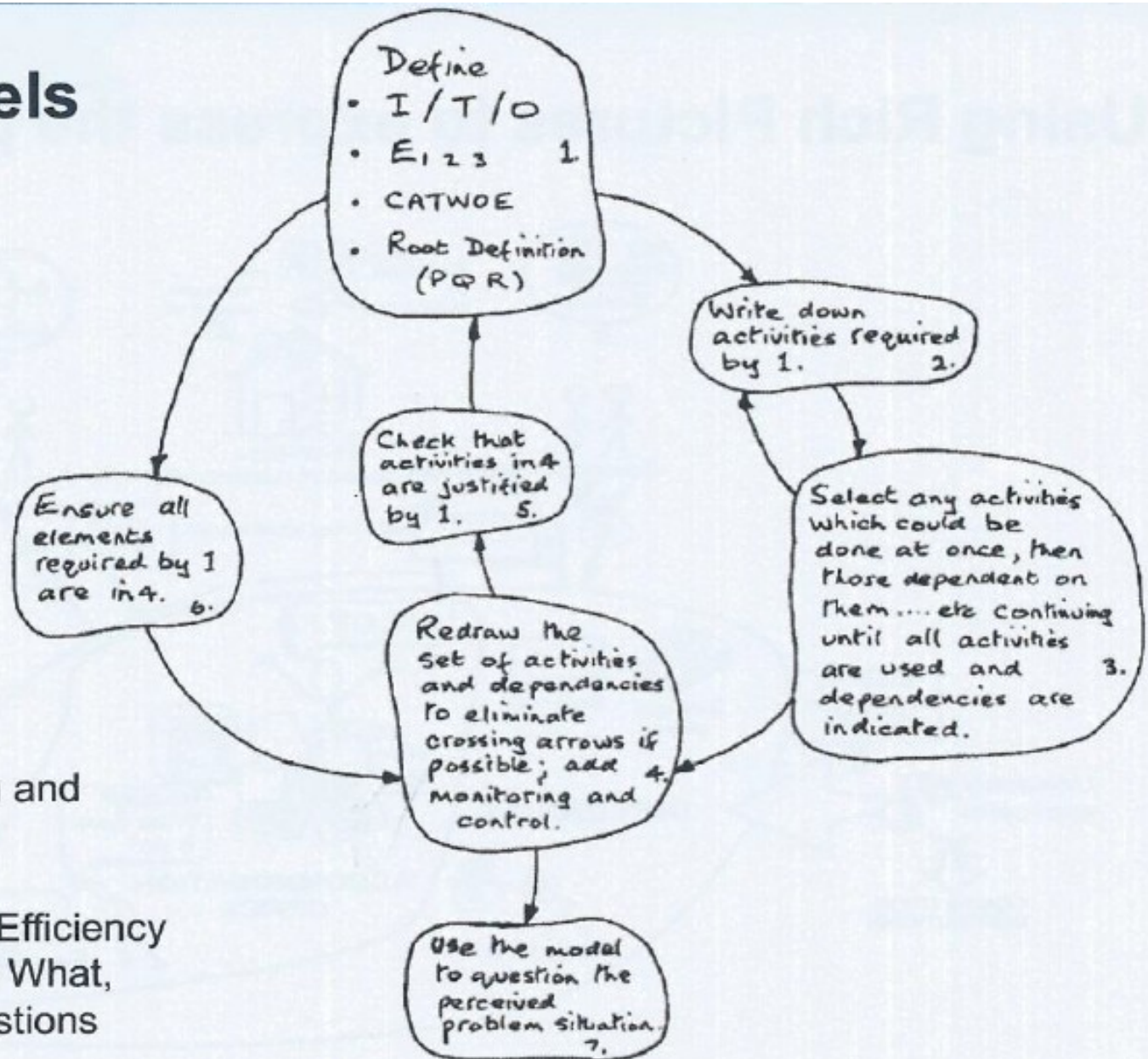
Soft Systems Methodology

Perceptual complexity, solutions design

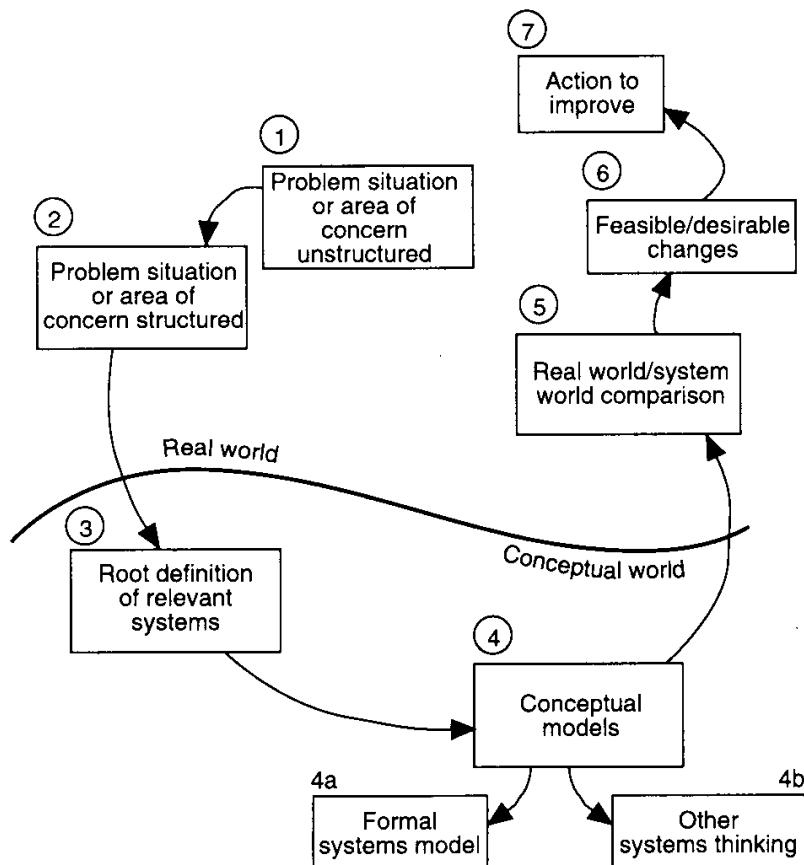
- A methodology for tackling ill-structured, complex problems through iterative learning cycles and participatory modelling.
- Used in public sector planning, community engagement, and organisational analysis.
- Developed by Peter Checkland in the 1970s; widely taught in systems thinking and management courses.
- Structured: employs iterative cycles of problem analysis and solution design. Tools include rich pictures and conceptual models.
- Facilitator-driven processes: Facilitators guide participants through structured inquiries. Stakeholders collaboratively develop and test conceptual models.
- Designed specifically for complex, 'messy' problems.
- Applied in urban planning and public sector strategy.



SSM Models



- I/T/O, Input, Transformation and Output
- E's, Efficacy, Effectiveness, Efficiency
- P, Q, R are the What, How, Why questions



- **Clients** – Who are the beneficiaries or victims of this particular system? (Who would benefit or suffer from its operations?)
- **Actors** – Who are responsible for implementing this system? (Who would carry out the activities which make this system work?)
- **Transformation** – What transformation does this system bring about? (What are the inputs and what transformation do they go through to become the outputs?)
- **Worldview** – What particular worldview justifies the existence of this system? (What point of view makes this system meaningful?)
- **Owner** – Who has the authority to abolish this system or change its measures of performance?
- **Environmental constraints** – Which external constraints does this system take as a given?

Open Space Technology (OST)

Dynamic complexity, emergent change

- A self-organizing practice that allows participants to create their own agenda around a central theme.
 - Uses include innovation, conflict resolution, community engagement.
 - Introduced by Harrison Owen in 1985; widely adopted for its simplicity and effectiveness.
 - Emergent and adaptive: Lacks a formal agenda; topics emerge organically from participants. Participants propose and lead sessions based on their interests.
 - Self-organized and participant-led: Participants take responsibility for convening and attending sessions. The 'Law of Two Feet' encourages individuals to move to sessions where they can contribute and learn.
- Key steps or phases
 1. Opening circle: Introduce the theme.
 2. Creating the agenda: Participants propose session topics.
 3. Concurrent sessions: Discussions occur in parallel.
 4. Closing circle: Share insights and next steps.
 - Highly flexible and adaptable to various group sizes. Encourages personal responsibility and active participation.
 - Used in tech conferences and community problem-solving events.

PRINCIPLES

Whoever come are the
right people.

Whenever it starts is the
right time.

Whatever happens is the
only thing that could have.

When its over, its over

Tell the truth

- Show up and be present without preconceived notions.
- Say what is so, when it is so, without blame or judgment.
- Pay attention to what has heart and meaning.
- Be open to outcome not attached to outcome.

Law of two feet

- Bumblebees cross-pollinate
- Butterflies observe in silence

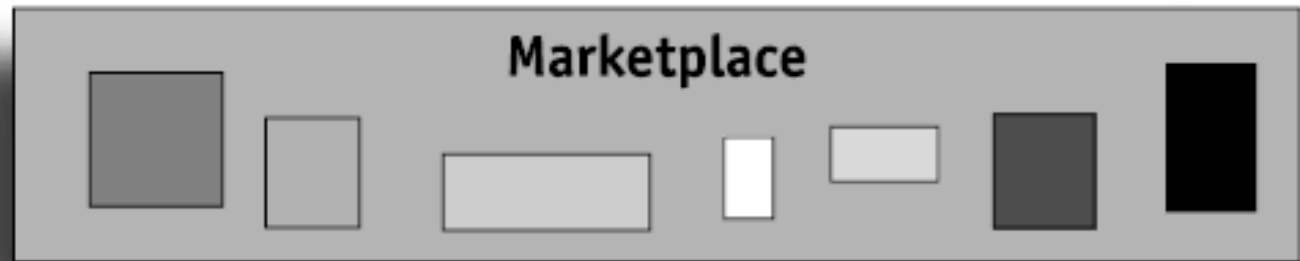
Passion, responsibility

The circle: face to face

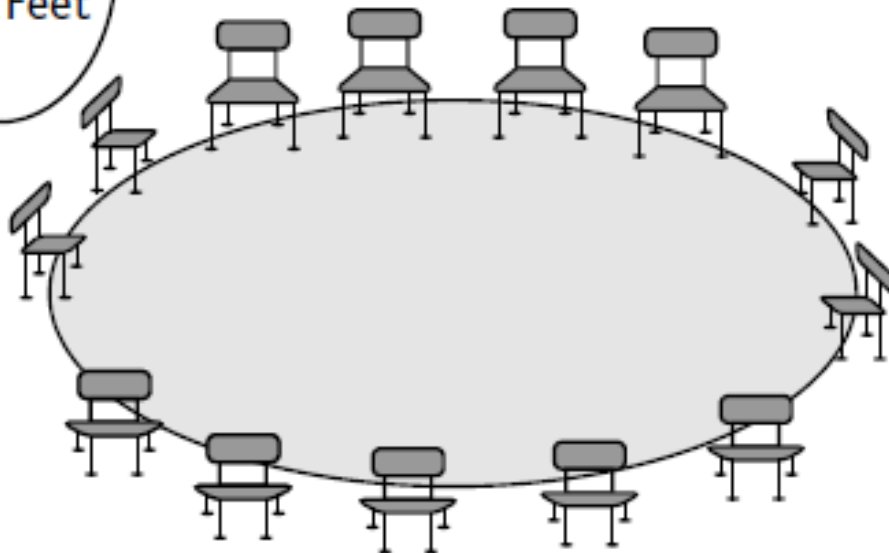
The breath of life

The bulletin board agenda

The marketplace of ideas



The
Law of
Two Feet



The Four Principles

Whoever comes are the right people.

Whatever happens is the only thing that could have.

Whenever it starts is the right time.

When it's over, it's over.



Real-Time Strategic Change/Real-Time Work Design

Structural complexity, visioning and alignment

- Aligns strategies, structures, and processes across large systems in real time, fostering widespread engagement.
- Large-scale organisational transformation, strategic planning, system alignment.
- Developed by Robert Jacobs in the 1990s; widely used in corporate and non-profit sectors.
- Structured: Highly planned and step-by-step, focusing on simultaneous alignment across organisational levels. Uses large-scale meetings to synchronise vision and implementation.
- Involves representatives from all parts of the system for simultaneous engagement. Large events featuring cross-functional teams working together on real-time plans.
- Key steps or phases
 - Engage stakeholders: Align goals and set expectations.
 - Large-scale meetings: Identify priorities and co-design actions.
 - Sustain momentum: Implement changes and evaluate progress.
- Aligns the whole system in a short timeframe. Integrates planning and execution seamlessly.
- Widely applied in mergers, cultural transformations, and strategy rollouts.

Traditional Strategic Planning	vs.	Real-Time Strategic Planning
• Focused on goal setting and not strategy • Often more of a team building exercise • Produces a large document over a set time period (typically 3 years) that often "sits on the shelf"		• A coordinating set of actions that dramatically increase the success of the organization • Aimed at creating and sustaining a competitive advantage • Produces short working documents to enhance decision making on an ongoing basis

Real-Time Strategic Planning is

"faster, continuous cycle of thinking and action that helps nonprofits identify, understand and act on challenges and opportunities as they arise."

Whole-Scale™ Change

Structural complexity, visioning and alignment

- A systems-based method for involving the whole organisation in planning and implementing change.
- Used in cultural transformation, strategic alignment, organisational redesign.
- Evolved as a derivative of RTSC; focuses on whole-system thinking.
- Structured: Uses structured events and facilitated dialogue to ensure alignment across stakeholders. Large-scale facilitated sessions combining strategic goals with individual roles.
- Whole-system inclusion: Brings all levels of the organisation into the conversation for systemic alignment. Cross-functional discussions during facilitated workshops.

Key steps or phases

- Pre-event planning: define goals and set up the framework.
- Whole-system events: create shared understanding and action plans.
- Post-event implementation: ensure changes are integrated system-wide.

Emphasises both planning and collective ownership of outcomes.

Widely used in restructuring efforts and cultural realignments.

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

Change Model

Core Beliefs and Values

- **Creating Empowerment and Participation**

We believe in engaging the entire organization in ways that lead to ownership of and commitment to a shared purpose and future direction.

- **Creating Community**

We believe that when you foster an environment where employees can come together, they can create and believe in something larger than themselves.

- **Using Reality as a Key Driver**

We believe the change process must keep a continual focus on the simultaneous and sometimes conflicting realities that exist in the internal and external environments of the organization.

- **Building and Maintaining a Common Database**

We believe that a “level playing field” of information and common understanding of the strategic issues informs the discretion of people at all levels so that they can make wise decisions, individually and collectively.

- **Creating a Shared Preferred Future**

We believe creating a collective “image of potential” for the future forms the basis for action today.

- **Creating Change in Real Time**

We believe in simultaneous planning and implementation of individual, group and organizational changes.

- **Practicing Action Research**

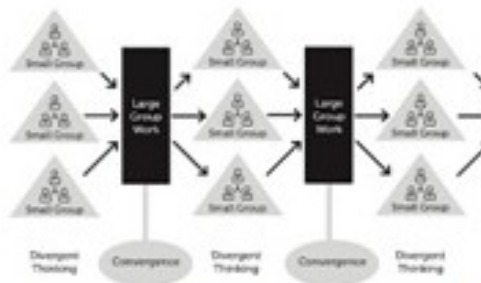
We believe that only through continuous re-examination throughout the process can our clients adjust their approach to ensure reaching their vision of success.

- **Transferring Learning**

We have a strong value for creating self-sufficiency and against creating dependency on us in our client systems. Our goal for the completion of a project is that participants will make our methods their own so they can feel confident and capable of carrying on with or without Dannemiller Tyson Associates.



Action Learning Model



Converge Diverge Model



GETTING STARTED

Who needs to be involved to build a common database?
What data needs to be heard, be shared?
For what purpose?
What needs to be different because we achieve that purpose?

①

1-A Building a Common Database

- Multiple realities
- Shared understanding
- Strategic focus

②

WHAT'S NEXT?

Who needs to be involved now?
What conversations need to take place? Among who?
What will be different because we talked together?

2-A Implications for Us

- What does that new data mean for us?
- How does the new data change our picture of current realities?

WHAT'S NEXT?

Who needs to be involved now?
What conversations need to take place?
What will need to be different as a result?

③

3-A

Becoming "Whole" about the Future We See

- Uncovering and combining our educated yearnings for the future
- Picturing what we need to be
- Creating the shared image of where we need to be (e.g., a new strategy, a new culture, a new structure)

④

WHAT'S NEXT? Who who needs to be involved now?
What conversations need to happen?
What will need to be different as a result?

4-A

Agreeing on Change Goals

- Developing bigger picture goals, based on the gap between where we are and where we yearn to be
- Looking at system-wide possibilities for action on these goals

⑤

WHAT'S NEXT?

Who needs to be involved now?
What still needs to be agreed on in order to have a "whole" plan?
What conversations need to happen?

⑦

SUSTAINING RESULTS . . . What do we need to do differently from here? Who needs to be involved as we move forward? What conversations and commitments need to take place? What needs to happen to re-build our common database?

6-A

Time to Check & Measure

- What did we say we'd do?
- What did we actually do?
- What have we learned from that?
- Where do we go from here?

WHAT'S NEXT?

Who needs to be involved?
What conversations need to be kept going?
What will be different?

⑥

5-A

Committing to Specific Actions

- What new actions do we need to leap forward?
- Who will be responsible?
- By when?
- How will we know we got there?

1 This is a point where you might be beginning a systemwide change process and you would (as an Event-Planning Team) be asking and acting on the issues.
2-7 The Event-Planning Team, or some other microcosm group, needs to be asking these questions and acting on the answers to plan the next step.

Whole Systems Approach

Structural complexity, visioning and alignment

- A comprehensive framework that applies systems thinking principles to address large-scale, complex problems through stakeholder engagement and systemic alignment.
- Used for organisational transformation, systems redesign, and strategy alignment.
- Rooted in systems thinking literature; widely adapted across organisational and community settings.
- Structured: Focuses on analysing and redesigning systemic interdependencies. Tools include causal loop diagrams and stakeholder mapping.
- Whole-system inclusion: Engages all levels of a system for co-creating solutions. Mixed-group workshops featuring diverse stakeholders.
- Key steps or phases
 1. Diagnose current state: Analyse existing system structures.
 2. Design future state: Co-create visions and strategies.
 3. Implement solutions: Align actions across all stakeholders.
- Integrates systems thinking with participatory approaches.
- Used in public health system redesigns and community development projects.
-

Axelrod Conference Model®

Structural complexity, visioning and alignment

- A multi-event process designed to engage all parts of an organisation in systemic change.
 - Used for organisational redesign, strategic implementation.
 - Developed by Richard Axelrod; remains a key structured methodology for systemic engagement.
 - Structured: Focuses on multiple linked conferences to build momentum and alignment. Facilitated events with specific stakeholder roles and predefined agendas.
 - Whole-system inclusion: Involves key organisational representatives across multiple sessions. Each conference tackles specific issues and feeds into the next.
1. Conference design: Establish goals and structure.
 2. Linked events: Conduct a series of connected meetings.
 3. Follow-up: Monitor progress and refine strategies.
- Builds alignment progressively through linked conferences.
 - Used in organisational redesign and long-term strategic initiatives.

Key steps or phases



Figure 1. The Conference Model

M&G Taylor Method/Decision Accelerator/DesignShop

Structural complexity, solutions design

A structured process for tackling complex challenges through immersive, design-driven environments.

- Innovation, strategy, design-sprints, and decision-making.
- Originated in the design and innovation sector; continues to be used in high-stakes corporate environments.
- Explicitly focused on Ashby's Law. Blends design thinking / large-group facilitation.

Technology-enabled and augmented:

- Uses design-thinking principles and visual facilitation tools. Tools like collaborative whiteboards and real-time data synthesis.
- Facilitators create structured but flexible design spaces. Groups iterate prototypes within an immersive workshop.

Key steps or phases

- Frame the problem: Define goals and constraints.
- Facilitated sessions: Explore, ideate, and prototype solutions.
- Synthesis and next steps: Identify actionable solutions.

Sizings:

- Type I PatchWorks
- Type II Strategic-Transformational
- Type III Tactical
- Type IV DesignShop Inside
- Type V Augmented Meetings

Summary from: Towards a Practice of Collaborative Sustainable Innovation Design – Foresight Enhancement and the DesignShop Process – Dee Brooks

DesignShop methodology, for collaborative innovation and strategic foresight.

- The DesignShop methodology is a structured approach to collaborative design and problem-solving that engages a diverse group of stakeholders in intensive, iterative, and facilitated sessions. It aims to harness collective intelligence to address complex challenges and create innovative solutions.
- Diverse Perspectives: By involving a wide range of stakeholders, the process leverages diverse perspectives and expertise, which enhances creativity and problem-solving.
- Iterative Approach: The methodology emphasizes iterative cycles of work, allowing for continuous refinement and improvement of ideas.
- Structured Facilitation: The process is guided by experienced facilitators who use a variety of tools and techniques to keep the group focused and productive.
- Collaborative Environment: The methodology fosters a collaborative environment where participants feel empowered to contribute and co-create solutions.
- Visual Sensemaking: The use of visual tools and graphic facilitation helps participants to better understand and engage with complex information.

MG Taylor method – steps in delivery

Problem Definition:

- Initial Dialogue: Engage with lead sponsors to understand the challenge.
- Sponsor Design Session (SDS): Conduct a workshop with key stakeholders to frame the problem and establish objectives.
- Problem Frame: Develop a detailed problem frame that outlines the scope, objectives, and desired outcomes.

Intervention Co-Design:

- Module Selection and Draft Agenda: Choose appropriate modules and create a draft agenda for the DesignShop session.
- Assignment Writing and Customization: Prepare customized assignments and exercises tailored to the specific challenge.
- Team Assignments: Organize participants into diverse teams to ensure a mix of perspectives.
- Knowledge Inputs: Gather and prepare relevant information and resources to support the session.

Day 1: Focusing on scanning and understanding the problem.

Day 2: Focusing on developing and testing solutions.

Facilitation: a combination of plenary sessions, breakout groups, and report-outs to guide the process.

Outputs and follow-through:

- Capture work: document all work done by participants during the session.
- Compendium and executive summary: create a detailed compendium of the session's outputs and an executive summary for broader communication.

Key components

- Futures Swarm: An environmental scanning exercise to identify trends, signals, and emerging issues.
- Scenarios and Test: A two-part exercise where participants create and test scenarios to explore alternative futures and their impact on proposed solutions.

Table 3. Inayatullah's (2015) 6 Pillars

Pillar		Key Questions
1	Mapping	What is the history of the issue? Which events and trends have created the present?
2	Anticipation	What are your projections of the future? If current trends continue, what will the future look like?
3	Timing	What are the hidden assumptions of your predicted future? Are there some things taken for granted (about gender, or nature or technology or culture)?
4	Deepening	Is there a supportive narrative, a story? If not, create a metaphor or story that can provide cognitive and emotive support for realizing the desired future.
5	Creating alternatives	What are some alternatives to your predicted or feared future? If you change some of your assumptions, what alternatives emerge?
6	Transforming	What is your preferred future? How did you get here? What steps did you take to realise the present?

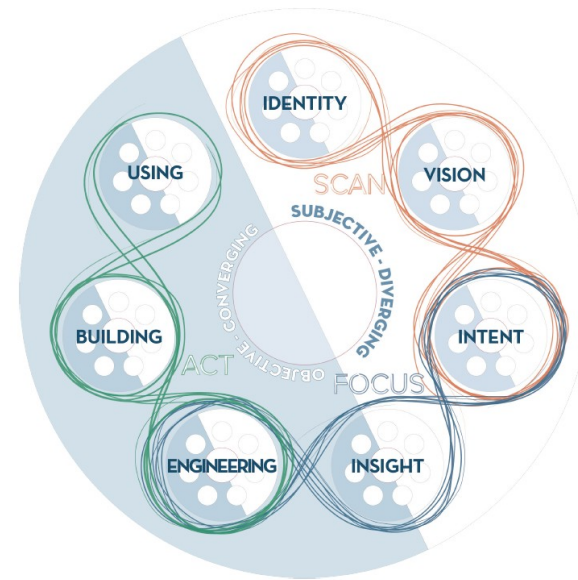


Figure 4. A hybrid version of two MG Taylor models. The Creative Process Model (Taylor, Evans, & Bird, 2018, p. 190), and Scan Focus Act (ibid, p. 292). All rights reserved by MG Taylor, the original copyright holder to the underlying models.

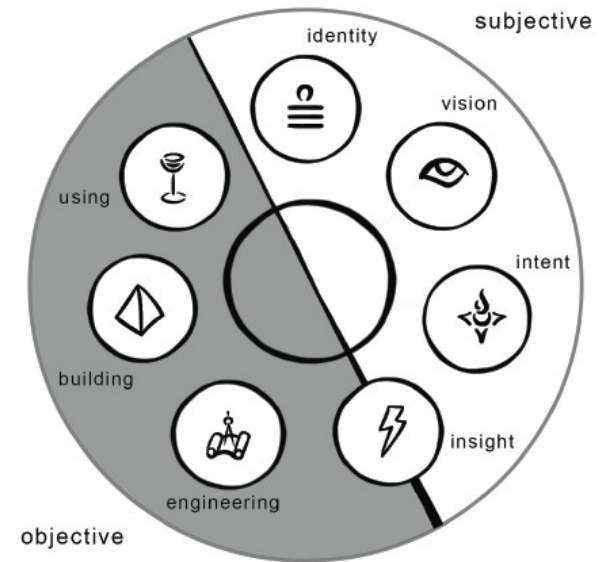


Figure 2. Creative Process Model. Reproduced from Taylor, Evans, & Bird, 2018, p. 190. All rights reserved by original copyright holder.

A messy issue

3 to 9 weeks of co-design

Collaborative Flow Experience

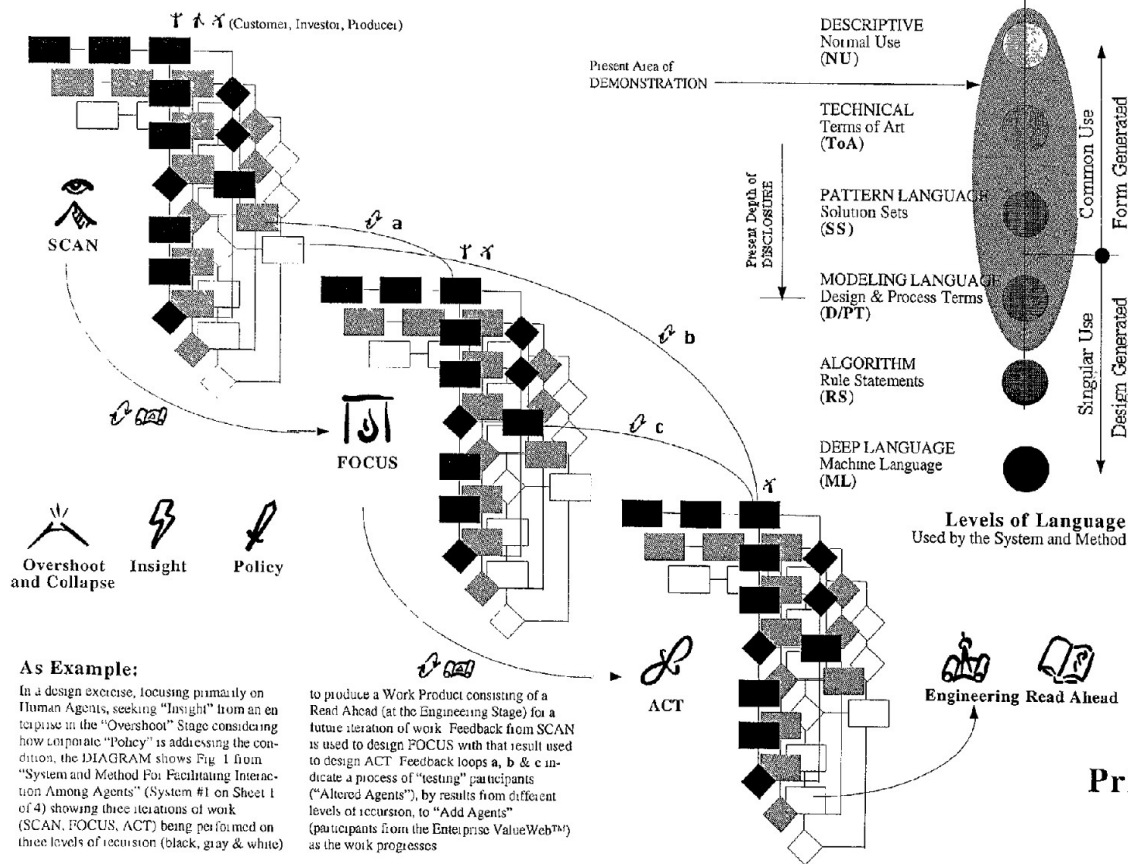
A co-designed solution



Figure 3. A depiction of the DS engagement model used in my professional practice, modified to reflect the 4-stage framework used in this study to describe the DS Approach.

Table 2

System and Method for Augmenting Knowledge Commerce



As Example:

In a design exercise, focusing primarily on Human Agents, seeking "Insight" from an enterprise in the "Overshoot" Stage considering how corporate "Policy" is addressing the condition, the DIAGRAM shows Fig. 1 from "System and Method For Facilitating Interaction Among Agents" (System #1 on Sheet 1 of 4) showing three iterations of work (SCAN, FOCUS, ACT) being performed on three levels of recursion (black, gray & white)

to produce a Work Product consisting of a Read Ahead (at the Engineering Stage) for a future iteration of work. Feedback from SCAN is used to design FOCUS with that result used to design ACT. Feedback loops a, b & c indicate a process of "testing" participants ("Altered Agents"), by results from different levels of recursion, to "Add Agents" (participants from the Enterprise ValueWeb™) as the work progresses

Rule of Recursion

All elements that define viability, on one level of recursion, of a system must occur on all levels of recursion of the system.

For a *complex* agent to be viable or for a simple agent to be effective in a complex environment, (of agents) the Agent must be "acted upon" (and/or be acting) at a minimum of three Levels of Recursion ("above," at the level of the Agent and a level "below" the Agent).

Actions that on a single Level of Recursion that are additive, on multiple Levels of Recursion will usually be multipliers. *Leverage* is accomplished by employing more than one Level of Recursion (thus, dealing with the Requisite Variety Rule; Variety must equal Variety). Generally, greater complexity can be dealt with or accomplished by employing Recursion than by action on one level of a system (given the same number of actions and level of resources).

Emergence happens "between" (out of) Levels of Recursion.

Rule of Iteration

All things being equal, a single iteration of work, in isolation, is additive between steps while multiple iterations of work (in a continuous process) multiplies results.

Work iterations must happen in rapid succession and within time compression for maximum effect.

Rule of Feedback

Feedback is the message from a sensor of the system to the controller of the system of the difference between performance and expectation. Positive feedback amplifies; negative feedback attenuates.

Feedback on feedback and/or feedback between Levels of Recursion is feedback of a *complex* kind and is required for the governance (self correction) of complex and emergent systems.

Rule of Iterative, Feedback Driven Systems acting on Multiple Levels of Recursion

These systems exhibit *increasing returns* and learning. They co-evolve (with their environment) emergent behavior. They are open-ended and cannot be predicted or controlled.

These systems can be *operated* in a way so that the desired *kinds* of results are consistently accomplished. This is possible when the Rules of Iteration, Feedback and Recursion are employed in a System of specific architecture (as described) that employs sufficient critical mass. Emergence is the result of complexity. Complexity is a factor of iteration, feedback, recursion, critical mass and the number of Agent (nodes) interactions in a specific time period and place.

Principles of Iteration and Feedback and The Rule of Recursion

Table 6. Facilitator's "straw dog" agenda for the DesignShop at OCAD University

Day 1 agenda				
Planned Start	Planned Finish	Time	Mod #	Module
9:30 AM	9:55 AM	25	0	Welcome and intro
9:55 AM	10:15 AM	20	1a	Futures Swarm
10:15 AM	10:35 AM	20	1b	Domino RO
10:35 AM	10:55 AM	20	2a	Student Personas to 2023
10:55 AM	11:40 AM	45	2b	"Day in the Life" Experience Journey
11:40 AM	12:05 PM	25	2c	Report Out
12:05 PM	1:20 PM	75	4c	First Draft
1:20 PM	1:50 PM	30	4d	Report Out
1:50 PM	2:30 PM	40	5a	Synthesis Conversation
2:30 PM	3:45 PM	75	5b	Work in Teams
3:45 PM	4:15 PM	30	7	Final Report Out
4:15 PM	4:25 PM	10	8	Closing Remarks

Table 6. Facilitator's "straw dog" agenda for the DesignShop at OCAD University

Day 2 agenda				
Planned Start	Planned Finish	Time	Mod #	Module
12:00 PM	12:15 PM	15	0	Welcome and intro
12:15 PM	12:45 PM	30	1a	Synthesize and refresh
12:45 PM	1:15 PM	30	1b	Switch stations without reporting out
1:15 PM	1:35 PM	20	1c	Report out
1:35 PM	2:20 PM	60	2a	Scenarios and test models in futures
2:20 PM	2:45 PM	25	2c	Report Out
2:45 PM	3:40 PM	40	4c	2nd draft
3:40 PM	4:10 PM	30	4d	Report out and sticky feedback
4:10 PM	4:50 PM	40	5a	Final work round
4:50 PM	5:00 PM	10	8	Closing Remarks

Axioms

- The future is rational only in hindsight.
- You can't get there from here, but you can get here from there.
- Discovering you don't know something is the first step to knowing it.
- Everything that someone tells you is true. They are reporting their experience of reality.
- To argue with someone else's experience is a waste of time.
- To add someone's experience to your experience--to create a new experience--is possibly valuable
- The only valid test of an idea, concept or theory is what it enables you to do.
- You understand the instructions only after you have assembled the red wagon.
- If you can't have fun with the problem, you will never solve it.
- Every individual in this room already possesses the answer. The purpose of this intensive interaction is to stimulate one, several, or all of us to remember and extract what we already know.
- Creativity is the process of eliminating options.
- In every adverse condition, there are hundreds of good solutions.
- You fail until you succeed.
- Nothing fails like success

Consensus Workshop Method

Structural complexity, solutions design

A facilitation technique that guides participants to achieve shared understanding and agreement on complex issues.

Used for team alignment, community decision-making, and policy development.

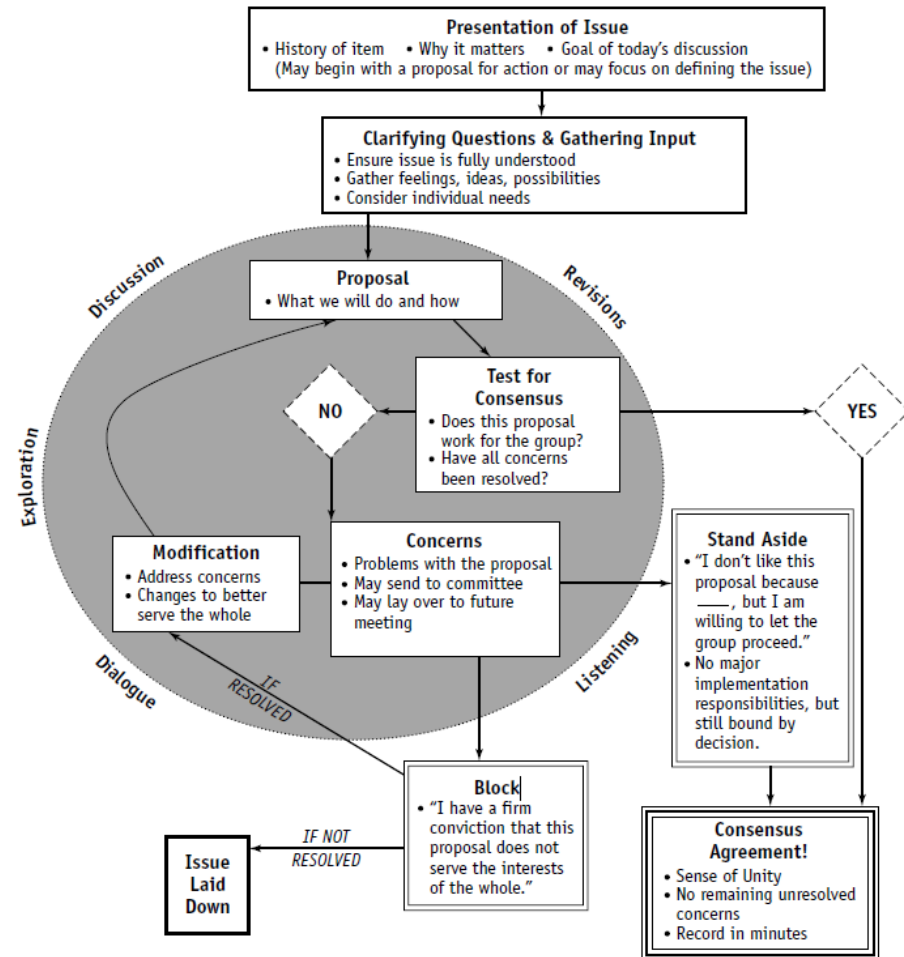
Developed by ICA Canada; widely taught and applied in participatory settings.

Structured: Uses predefined steps to build consensus progressively. Includes focused conversations and idea synthesis.

Facilitator-driven processes: Skilled facilitators guide the group towards consensus.

Facilitators use methods like silent brainstorming and group clustering.

1. Brainstorming: Gather ideas individually or in groups.
2. Clustering: Group similar ideas into themes.
3. Consensus building: Prioritise and agree on outcomes.

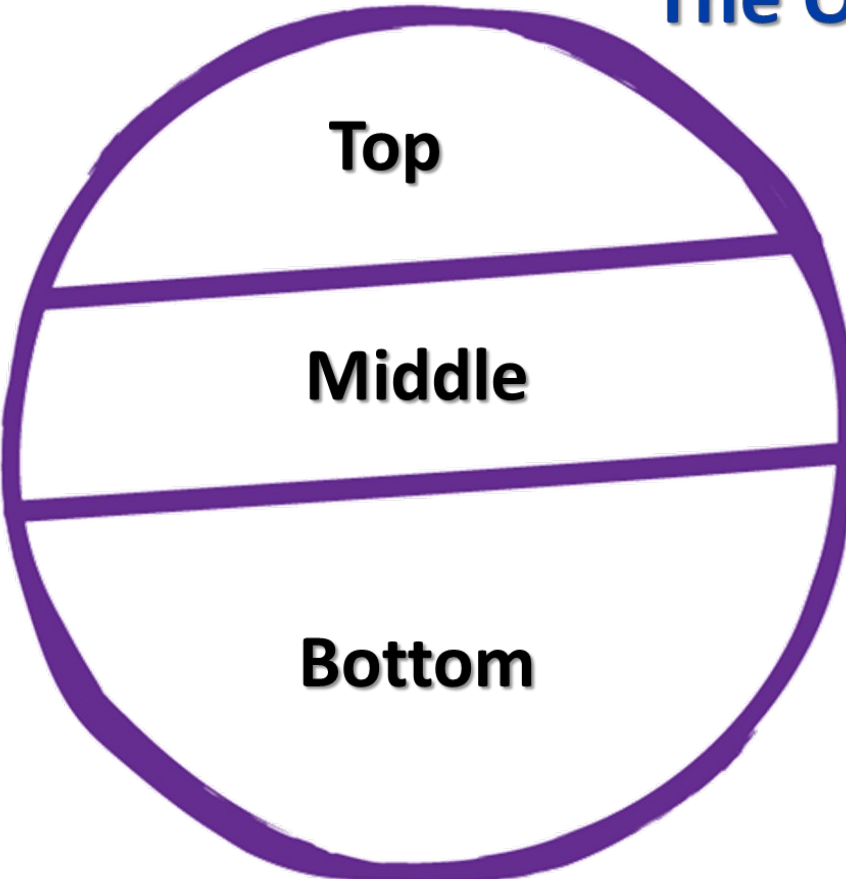


The Organization Workshop

Structural complexity, emergent change

- A participatory process designed to explore organisational dynamics, focusing on power, collaboration, and systemic change.
- Used for leadership development, team building, cultural transformation.
- Developed by Barry Oshry; widely used in leadership training and organisational consulting.
- Structured: uses role-playing and simulations to reveal organisational dynamics. Simulations explore relationships between 'tops,' 'middles,' and 'bottoms.'
- Facilitator-driven processes: Facilitators guide participants through structured simulations. Role-playing as different organisational levels.
- Key steps or phases
 1. Role assignments: Assign participants to organisational roles.
 2. Simulated scenarios: Explore challenges and dynamics.
 3. Debrief and reflection: Analyse insights and lessons.
- Focuses on understanding power dynamics and relationships.
- Used in leadership development programs globally.

The Organization



Top

Tops have overall responsibility for the organization

Middle

Middles execute the vision of the Tops. Middles approve the Bottoms' ideas and communicate them to the Tops

Bottom

Bottoms produce the organization's products and services. They communicate their ideas through their Middle

In Barry's own words

The Organization Workshop (OW) is a group learning session in which participants experience universal conditions, traps, and dilemmas of organizational life. By learning firsthand about these traps, along with solid theory on avoiding them, participants emerge with concepts, methods, and a common language to improve their interaction in any organization. The result is better partnerships for higher performance.

In the Organization Workshop, participants directly experience the costs of system blindness— the costs to them personally and to the organization—and they experience the organizational power as well as the personal liberation, creativity, and empowerment that come from moving from system blindness to system sight.

Elements

- Transition
- Days
- Reflections
- TOOTs

Schedule

- TRANSITION
 - Day 1, Reflection
 - Day 2, Reflection
-  TOOT
-  STRATEGIC FRAMEWORK
 - Day 3, Reflection
 - Day 4, Reflection **End**
-  STRATEGIC FRAMEWORK

Participative Design Workshops (PDW)

Structural complexity, emergent change

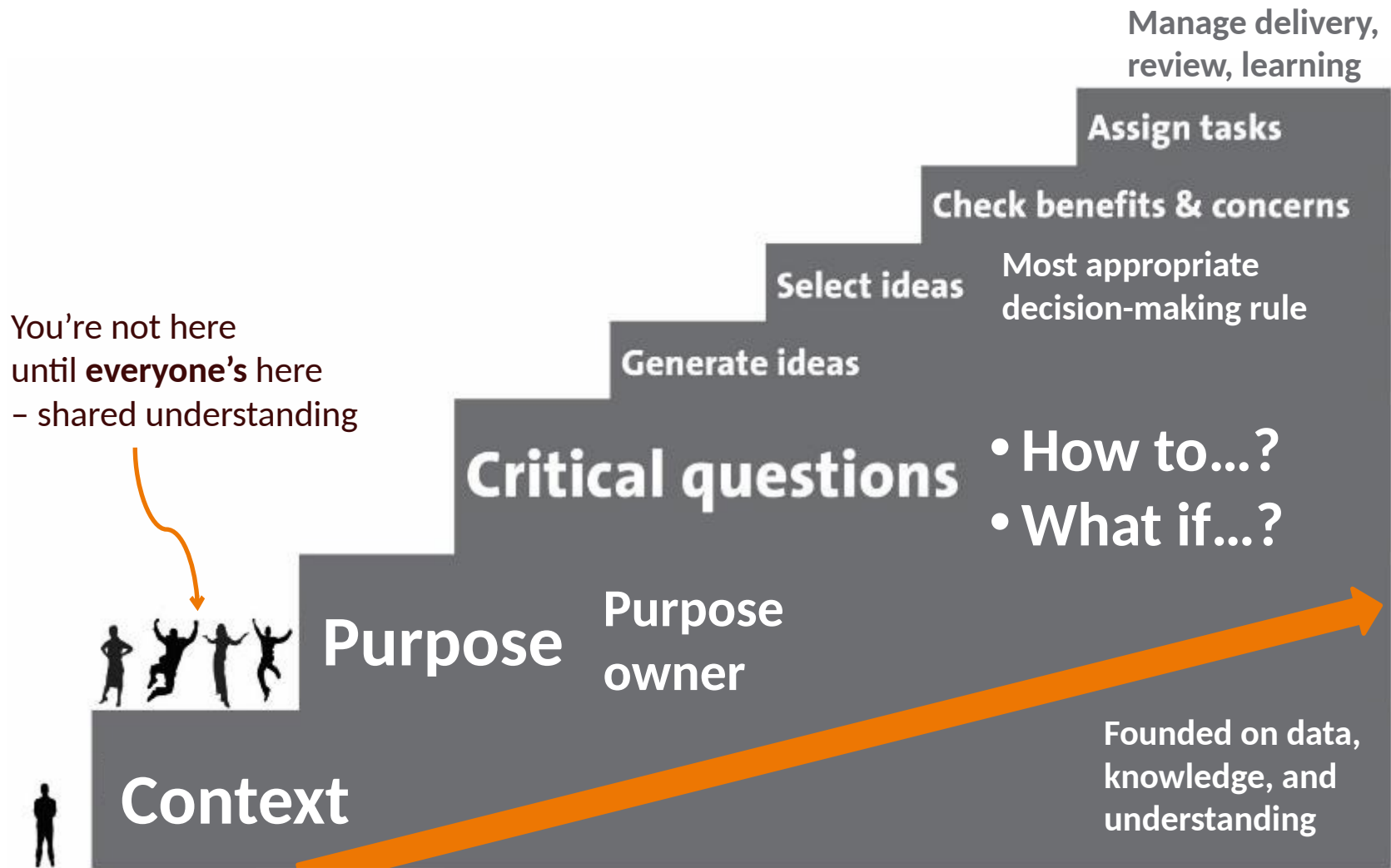
- A participatory process for redesigning work systems through collaborative decision-making.
- Used for workflow redesign, team collaboration, organisational improvement.
- Developed by Emery and Trist; widely used in participatory design projects.
- Structured: Employs participatory methods to redesign work processes collaboratively. Uses structured workshops to involve employees in system redesign.
- Whole-system inclusion: involves employees from all levels in design decisions. Cross-functional groups co-create work process improvements.
- Key steps or phases
 1. Define Objectives: Identify system inefficiencies.
 2. Collaborative Redesign: Engage teams in co-creating solutions.
 3. Implementation: Test and refine new processes.
- Empowers employees to take ownership of changes.
- Used in manufacturing and service industries for workflow optimisation.

Problem Solving Team Build/MacDonald Process

Structural complexity, solutions design

- A collaborative approach to building team capacity while solving organisational challenges.
- Uses include team development, conflict resolution, organisational improvement.
- Developed by MacDonald in corporate settings; remains popular in team-building contexts.
- Structured: Focuses on team collaboration through problem-solving exercises. Facilitators lead teams through structured problem-solving tasks.
- Facilitator-driven processes: Teams work under guided facilitation to build trust and solve challenges. Role-playing and collaborative exercises.
- Key steps or phases
 1. Define challenges: Identify team issues or organisational problems.
 2. Collaborative problem-solving: Work in groups to propose solutions.
 3. Feedback and synthesis: Refine and implement solutions.
- Combines problem-solving with team development.
- Widely used in corporate team-building sessions.

Team problem-solving



Problem solving team build

1. State the problem – ‘the headline’ – a clear sense of **purpose**
 - * *Test understanding with team – iterate until complete*
2. Provide the full **background** to the problem and any **relevant issues**
 - * *Test understanding with team – iterate until complete*
3. Get really clear about the **outcomes** and **potential barriers**
 - * *Work with team until complete (how to... / what if...)*
4. **Generate ideas** for solutions
 - * *Work with team until complete*
5. **Select ideas** to pursue – **agree plan**
 - * *Work with team until everyone is clear*
6. Get **benefits/concerns** of selected ideas
 - If any critical concerns exist, work on them using a mini problem solve*
7. **Assign tasks**
 - * *Test understanding with team – iterate until complete*

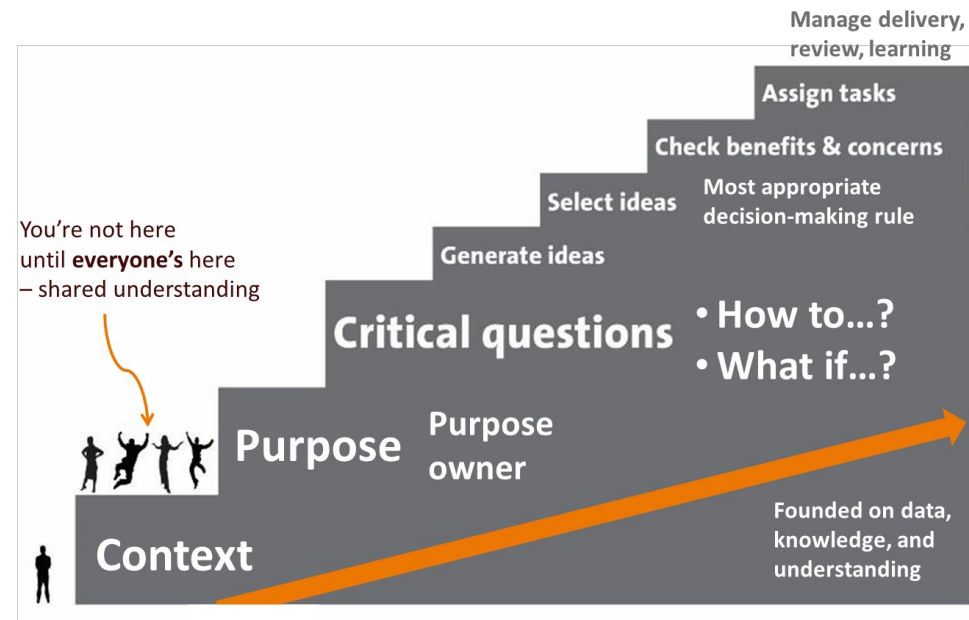
Prepared agenda – timekeeper – leader – creativity – ground rules

'Seven steps to heaven'

1. Understand enough context to move forward
Test understanding and iterate until complete
2. Generate enough of a shared and clear purpose to move forward
Test understanding and iterate until complete
3. Get really clear about the critical questions: outcomes and potential barriers
Generate a complete set of 'how to...' and 'what if...' questions
4. Generate ideas for solutions
Work until complete
5. Select ideas to pursue – agree plan
Work until everyone is clear
6. Get benefits/concerns of selected ideas
If any critical concerns exist, work on

them using this procs in miniature

7. Assign tasks
Test understanding and iterate until complete



‘How to... and ‘What if...’

- The **critical questions process** keeps you focused on the outcomes that matter, not fixated on the steps you have chosen
- ‘How to...’ questions frame the outcomes you need ‘how to achieve x’ – you don’t answer the question, just post it.
- ‘What if...’ questions, if answered, identify the risks and obstacles – what will we do if this happens?
- Generate a rounded set of critical questions – you’ve got enough when knowing the answers to these questions would get you to the results

Breaking the Shell

Dynamic complexity, emergent change

Unblocking barriers – used for organisational learning, personal growth, systemic adaptation.

The exercise is called 'breaking the shell', the minimum for it is about an hour (timings given below), although it works much better if given up to two hours. I've used it quite a lot and it really seems to work well.

[5 mins]

The set-up is to focus everyone on a vision - something clear and simple, quickly covered.

[15 mins]

Then the question is 'what barriers stand in the way of achieving this'? The idea then is to get as many barriers out as possible, one per post-it note. I usually get everyone to spend a couple of minutes producing as many as possible, then read them out and put them all on a flip-chart; hearing everyone else's tends to get people producing many more.

[10 mins]

At this stage it's a good idea to have a coffee break so people are just focusing on all the problems and issues - a deliberate down-point.

[5 mins]

The next step is to introduce the categorisation approach. Barriers are categorised into four groups:

Brick walls - insurmountable obstacles we just have to live

with!

Paper walls - look like real walls until tested, but are easily overcome, even by individuals

Partition walls - hard for individuals, but management or a project effort can overcome

Mindset issues - like collective paper walls, common assumptions that are not easily overcome

[10 mins]

Then everyone has to place their post-its on a different chart according to which type of barrier they are, and in the process group similar barriers together

[15 mins]

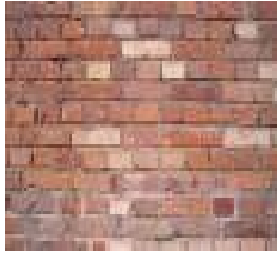
Finally, there is a group discussion to agree the categorisation and consider the issues.

The whole purpose of the exercise is to get all the concerns and obstacles out on the table, then change the way people are thinking about the obstacles. The categorisation changes our psychological approach - brick walls just aren't worth worrying about anyway, paper walls we should just get over, and the others can actually be worked on.

This naturally leads on to an action planning session - every individual commits to overcome their 'paper walls', and key actions to address the partition walls and mindset issues are discussed and agreed. The whole set could potentially be done in an hour and a half, if squeezed.



Breaking the shell: types of challenges



Brick walls

External and unalterable challenges which affect performance and are not likely to change.

Can't be changed

Partitions

Challenges that **can** be overcome with extra effort, time, money or people. Individuals might make progress, groups of employees can make more, management can overcome them totally.

We can change



Paper walls

Look like real challenges – until you test them. Then you realise you can simply push through them on your own, and others have already done so. Might exist because it is 'policy' etc.

I can change

Mindset challenges

The most difficult to deal with – untested beliefs and perceptions. When you believe you can't, you are correct. Something that needs to be changed collectively.

Innovate to change



World Café

Perceptual complexity, visioning and alignment

A conversational process that fosters dialogue, knowledge sharing, and collaborative thinking in a relaxed, café-like setting.

Used for knowledge sharing, community building, and strategic dialogue.

Developed in the mid-1990s by Juanita Brown and David Isaacs; remains a popular method for large-group discussions.

Emergent and adaptive: Participants rotate between small-group conversations, fostering a cross-pollination of ideas. Uses 'table hosts' to document ideas and themes that emerge.

Self-organized and participant-led: participants guide their discussions within a loose structure. Small tables with rotating participants ensure inclusivity and dynamic engagement.

Key steps or phases

1. Welcome and introduction: Set the theme and explain the process.
2. Small-group discussions: Explore questions in rotating groups.
3. Harvesting: Share insights and themes with the larger group.

Focuses on informal, relational dialogue to surface collective insights. Encourages cross-pollination of ideas through structured rotation.

Used in organisational planning, community problem-solving, and educational workshops.

‘The World Café is built on the assumption that ... People already have within them the wisdom and creativity to confront even the most difficult challenges; that the answers we need are available to us; and that we are Wiser Together than we are alone.’

Seven design principles

1) Set the Context



Pay attention to the reason you are bringing people together, and what you want to achieve. Knowing the purpose and parameters of your meeting enables you to consider and choose the most important elements to realize your goals: e.g. who should be part of the conversation, what themes or questions will be most pertinent, what sorts of harvest will be more useful, etc..

2) Create Hospitable Space



Café hosts around the world emphasize the power and importance of creating a hospitable space—one that feels safe and inviting. When people feel comfortable to be themselves, they do their most creative thinking, speaking, and listening. In particular, consider how your invitation and your physical set-up contribute to creating a welcoming atmosphere.

3) Explore Questions that Matter



Knowledge emerges in response to compelling questions. Find questions that are relevant to the real-life concerns of the group. Powerful questions that “travel well” help attract collective energy, insight, and action as they move throughout a system. Depending on the timeframe available and your objectives, your Café may explore a single question or use a progressively deeper line of inquiry through several conversational rounds.

4) Encourage Everyone's Contribution



As leaders we are increasingly aware of the importance of participation, but most people don't only want to participate, they want to actively contribute to making a difference. It is important to encourage everyone in your meeting to contribute their ideas and perspectives, while also allowing anyone who wants to participate by simply listening to do so.

5) Connect Diverse Perspectives



The opportunity to move between tables, meet new people, actively contribute your thinking, and link the essence of your discoveries to ever-widening circles of thought is one of the distinguishing characteristics of the Café. As participants carry key ideas or themes to new tables, they exchange perspectives, greatly enriching the possibility for surprising new insights.

6) Listen Together for Patterns & Insights



Listening is a gift we give to one another. The quality of our listening is perhaps the most important factor determining the success of a Café. Through practicing shared listening and paying attention to themes, patterns and insights, we begin to sense a connection to the larger whole. Encourage people to listen for what is not being spoken along with what is being shared.

7) Share Collective Discoveries



Conversations held at one table reflect a pattern of wholeness that connects with the conversations at the other tables. The last phase of the Café, often called the “harvest”, involves making this pattern of wholeness visible to everyone in a large group conversation. Invite a few minutes of silent reflection on the patterns, themes and deeper questions experienced in the small group conversations and call them out to share with the larger group. Make sure you have a way to capture the harvest – working with a graphic recorder is very helpful.

*World Café Design Principles
Stamp Illustrations by
Nancy Margulies*

World Café Guidelines



illustration by Avril Orloff

When Cultures Meet/Encounters With The Other

Dynamic complexity, emergent change

The meeting of cultures comes in many forms. Cultures meet when two organizations merge. Or when two units in an organization need to interact more effectively in order to achieve a desired outcome. Or when increasingly diverse populations enter the workplace. This meeting of cultures inevitably disrupts the status quo. Feelings and reactions are generated on all sides that regularly heighten interpersonal tensions and diminish overall organizational effectiveness.

When Cultures Meet addresses the pitfalls and the productive possibilities when differing cultures come together.

This workshop helps members of differing cultures deepen their understanding of and master the process of coming together so that they are able to develop a single, unified, high energy organization. The workshop generates the knowledge and skills necessary to make the process successful, creative and enriching.

This workshop explores the central role dominance plays in this process. The dominant culture is 'the way it has always been' in the work place or in society at large. The dominant culture has its 'rules' -- generally unaware and unspoken -- regarding what are acceptable and unacceptable behavior, speech, values, ways of working, and more. And into this culture come the 'others' with their own 'rules'. When we don't see or understand these differing cultures and their rules, we inadvertently push 'hot buttons' that trigger misunderstanding and conflict, all of which derail the goals

of working together.

FORMAT:

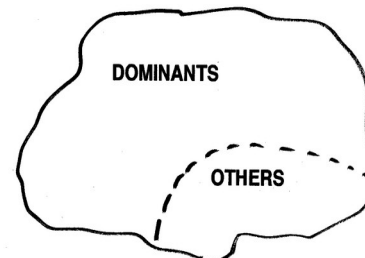
The workshop is a blend of experiential activities and debriefing, strategic frameworks, and application. It is comprised of two modules.

In the first, two cultures are created -- the Dominants and the Others. This dynamic simulation gets to the heart of issues faced by both Dominants and Others as these two cultures meet.

The second module focuses on the possibility of developing a single more robust organization. We explore moving from our reflex responses to differences to a more reflective response.

KEY LEARNING POINTS:

- To clarify the role dominance plays when two cultures come together.
- To identify 'hot button' issues that trigger misunderstanding across cultural lines.
- To provide an opportunity to practice listening to differences rather than be triggered by them.
- To apply a road map for creating a single robust human system in which cultural differences add to the creative energy of the system.



Schedule

		<u>total</u>
Introduction & Transition	15	15
Cultural Development & Practice	15	30
1. Distribute and discuss "Cultural Rules."		
2. Distribute the Tall/Short Cultural Rules.		
3. Start living your culture by creating a legend about how your culture began		
Separate Tasks		
Distribute "Design Competition" to Talls		
"Design Project" to Shorts	20	50
Merger Announcements are read to Talls & Shorts		
Merged task	20	70
Contest:	15	85
1. Talls present their legend and monument		
2. "Winner" is declared		
3. After contest, Shorts explain their legend		
BREAK	15	100
Debriefing	35	135
Dominance (PPT) conversation and activity	30	165
Dialogue: Dominance. What stands out for you about the morning's experience? What lesson(s) are you taking away from the experience? About yourself and dominance? About systems and dominance?	25	190

B. AFTERNOON SCHEDULE

(All times are approximate.)

		<u>total</u>
INTRODUCTION		
Choose your culture and form groups. If there is no one for Order Culture, ask for volunteers.	5 minutes	5
Develop your culture (large groups break into subgroups)	20 minutes	25
Announce acquisition by Order Culture		
TOOT	15 minutes	40
1. The Order Culture prepares presentation: Our Culture: What we value. The kind of system we hope to create. (The presentation should not be a caricature; rather, a welcoming Top overview.)		
2. Sub-groups:		
• What are your immediate reactions?		
• What are your concerns?		
• What do you most value about your culture that you are concerned about losing?		
ORDER CULTURE PRESENTATION	10 minutes	50
THE ROBUST SYSTEMS CHALLENGE	20 minutes	70
We know how it can go. The challenge is: Can we do better?		
PowerPoint summary		
CHALLENGE This is the moment when both parties face the challenge: Which way do we go: Dominance or Robust Systems? It's important for all parties to be in touch with their experiences at this point.		
MUTUAL SUPPORT TRIOS	45 minutes	117
STICKING POINTS	10 minutes	127
APPLICATION IN TRIOS (10-15 mins./person)	30/45 mins	157/172
1. Think about some system you are in or consult to.		
2. Think about the application of this framework to your situation.		
3. What implication for possible action are you seeing?		
REFLECTION ON THE DAY	15 minutes	
Distribute "We are a Robust System"		

Synteegration / Team Syntegrity

Dynamic complexity, emergent change

‘The one reason why companies fail: lack of massive communication between Systems 3 and 4’ Beer

Synteintegration / Team Syntegrity is a licensed product used for large group processes to handle complex and messy problems with many interdependencies.

Interdependence of issues requires parallel processing, and identifying issues is critical.

Synteintegration is built on a (protected) geometric model, an icosahedron – each node represents a topic and each strut represents a person. Structure helps manage the interdependence of topics.

Legal caveat: the terms ‘Synteintegration’ and ‘Team Syntegrity’ and associated elements (coloured icosahedron and algorithm) are protected under license by Malik, and unlicensed use can lead to legal action.

The process involves three iterations of meetings, each focusing on surfacing issues, integrating them, and planning actions. Each team is connected to ten other teams through shared membership and critic roles.

Participants provide input, Critics help keep team focused and manage process, Facilitators manage time and record discussions.

There are different models such as the octahedral model, which involves fewer topic groups and can be completed in a shorter time. The complexity of the problem dictates the number of issues, groups, and participants.

Tight organization and time management are crucial for success synteintegration.

Printed, color-coded timetables and badges help participants navigate.

Reverberation: as groups surface, integrate, and resolve issues, they start to share and shape these issues across iterations.

How synteegration works

‘Synteintegration differs from other collaborative group processes in several outstanding ways. Beer was seeking a means to affect the System 3/4 homeostat in organizational systems, as articulated in his Viable System Model...

Synteintegration was invented to help organizations balance attention and resources on both the ‘Inside and Now’ and the ‘Outside and Then’. Beer determined that a group of about thirty people brought enough variety to be representative, but recognized that special meeting protocols were required to ensure the group did not devolve into chaos and a useful outcome could be achieved. Beer’s deep understanding of neurophysiology, mathematics, philosophy, systems science, management cybernetics and other fields of

activity including the arts, resulted in a group process truly designed for humans, one that enables the best possible contribution of each participant, and mitigates the resulting complexity through means that generate and sustain both group cohesion and individual autonomy.’

Truss et al

Process:

- An opening question
- The problem jostle: generating statements of importance
- The lottery – allocation of people to topics and roles
- Outcome Resolve – three iterations

Patrick Hoverstadt – Fractal Consulting

- Deals with really complex and messy problems with lots of interdependencies
- The only large group process designed to produce convergence on a solution
- Other approaches are good at surfacing issues, Syntegration surfaces and resolves them
- Never failed for us

Client quotes:

- 'its magic...'
- 'That convergence is worth millions'

Most important points in his perspective:

- the most important point about syntegration is that it is (as far as I know) the only process designed to start with an unstructured problem and take the group through to resolution, taking into account all the interdependencies.
- Other approaches that do resolution tend to start later in this (not at the start) and there are lots – like Open Space Technology or World Café – that are good for opening up but not closing down.
- The way the structure absorbs the complexity is critical.
- Also the speed – which isn't unique as an event, but is as a soup to nuts resolution approach.

'Has never failed for us'



OTHER INTERESTING APPROACHES

Three Horizons

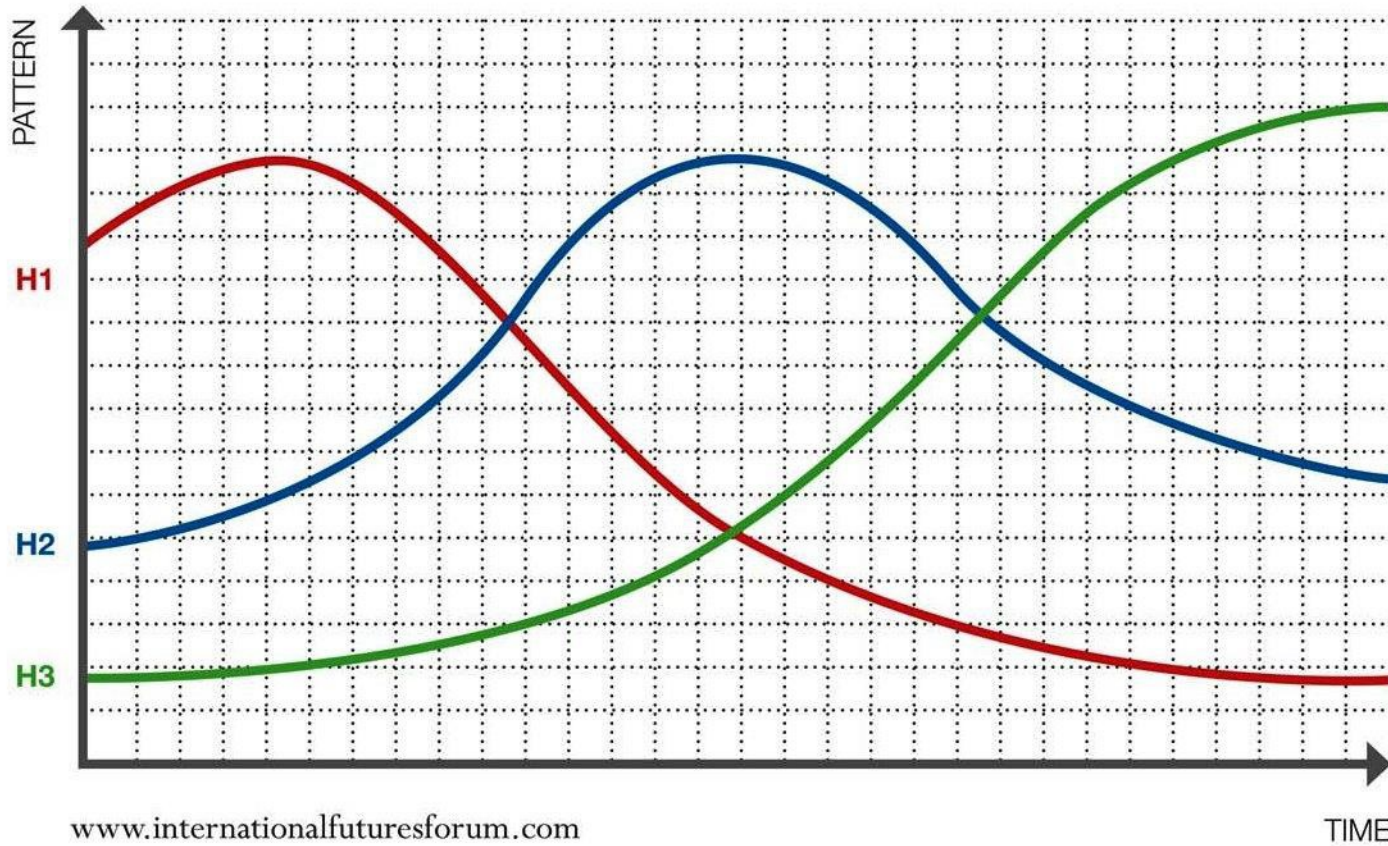
Perceptual complexity, visioning and alignment

- A foresight framework to explore the transition from the current system (Horizon 1) to emerging ideas (Horizon 3) via innovation and transitional activities (Horizon 2).
- Used for strategic planning, innovation, and navigating systemic change in business, government, and communities.
- Developed by Bill Sharpe, it remains popular in future-oriented organisations.
- Emergent and Adaptive: Encourages dialogue across stakeholders to envision future possibilities while addressing present constraints.
- Key steps: Identify current challenges (H1), explore future aspirations (H3), and map transitional innovations (H2).
- Similar to the Berkana Two Loops model (more relational and community focused) and the Panarchy Adaptive Cycle (more an ecological resilience perspective)
- Not to be confused with the IBM approach by the same name!

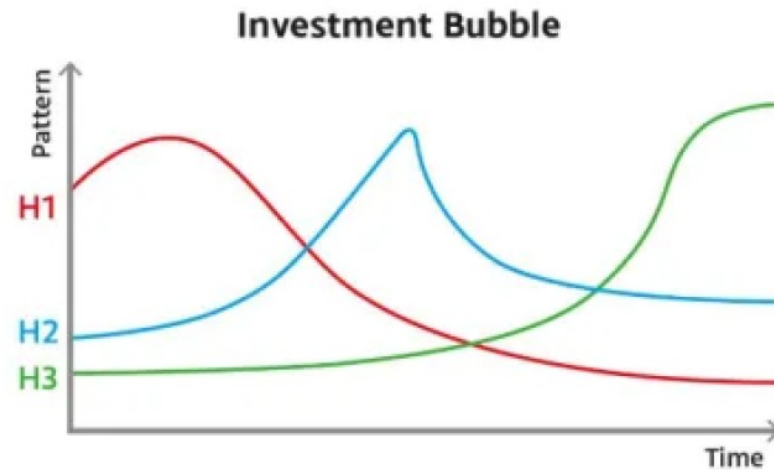
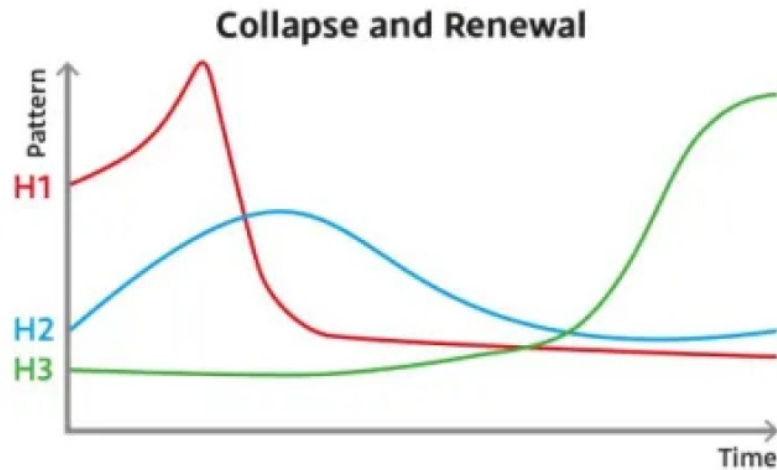
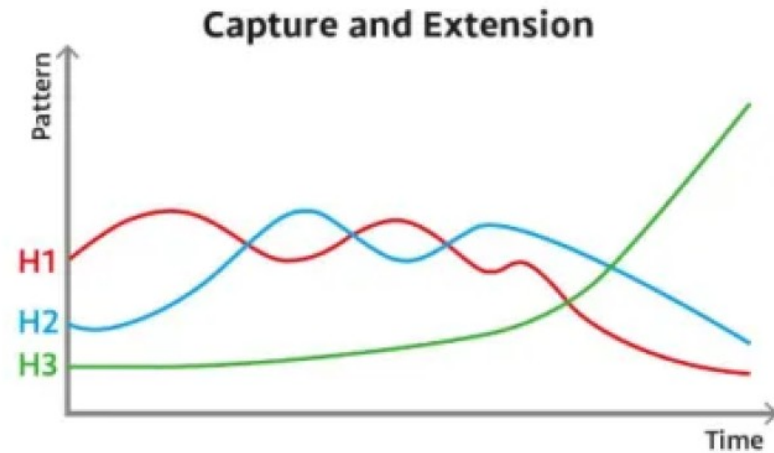
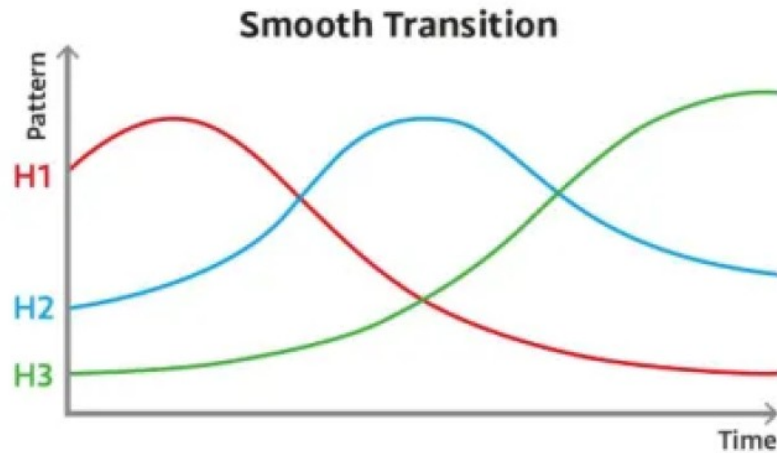
Three horizons



Three Horizons



Three horizons – possible modes



Three horizons links

- Kate Raworth's seven minute video https://youtu.be/_5KfRQJqpPU.
- Short blog article related to the video: <https://medium.com/@matchboxstudio/kate-raworths-three-horizons-framework-intro-a-guide-for-workshop-use-5e25235c587d>
- Another short blog which focuses on that 'messy middle' and what we need to do about it: <https://www.thersa.org/discover/publications-and-articles/ras-blogs/2020/04/change-covid19-response>

More on the Three Horizons if you want to explore:

- <https://www.iffpraxis.com/3h-approach>
- <https://collectiveleadershipscotland.com/week-1-2-three-horizons/>

Scenario Planning

Perceptual complexity, visioning and alignment

- A structured method to explore and prepare for multiple plausible future scenarios.
- Commonly applied in strategic planning, risk management, and long-term decision-making.
- Originated from military planning; popularised in corporate strategy by Shell in the 1970s.
- Structured methodology: Combines research, expert input, and facilitated workshops to build scenarios.
- Distinctive for its ability to manage uncertainty and guide flexible strategic choices.
- Approach:
 - Resist the pull for quick answers
 - Think about purpose more than data
 - If a leader, avoid being seduced by your role
 - Find a learning edge: if you are an 'answer' person, seek more questions and vice versa
 - Advocacy and inquiry: let disagreement be an asset. Seek first to understand



The process in ONE HOUR – five year perspective

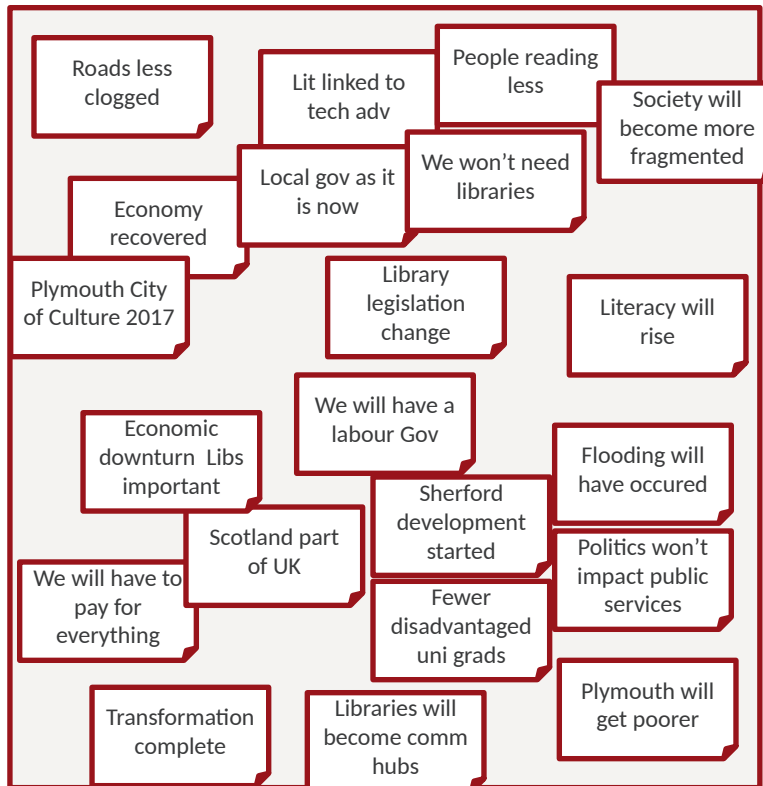
18:30:00	2 mins - setup: TWO TEAMS – TWO TEAM LEADERS
18:32:00	4 mins - silent brainstorm – certainties and uncertainties
18:36:00	5 mins - loud discussion – group the certainties, eject uncertainties
18:41:00	8 mins - organise and prioritise the uncertainties
18:49:00	2 mins - setup: ONE GROUP – ONE LEADER
18:51:00	5 mins - bring together and compare the uncertainties
18:56:00	8 mins - select the best uncertainties, create the scenario axes
19:04:00	2 mins - setup: FOUR GROUPS – FOUR LEADERS
19:06:00	8 mins - develop the scenario stories – collaborative team story build
19:14:00	1 min 30 - naming the scenarios
19:15:30	ONE GROUP
19:15:30	5 mins - one-minute report back
19:20:30	5 mins - discuss the implications
19:25:30	2 mins 30 - most surprising/interesting implications?
19:28:00	2 mins - retrospective and next steps
19:30:00	Ends

The high-intensity interval training version!

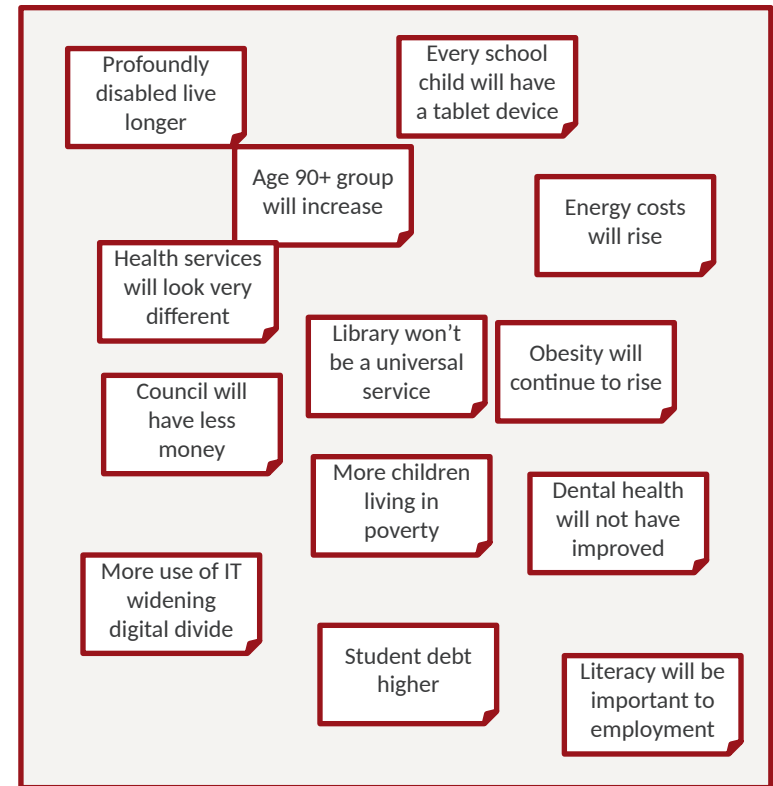
Certainties and uncertainties output

Group these by affinity – they provide the background for the scenario planning

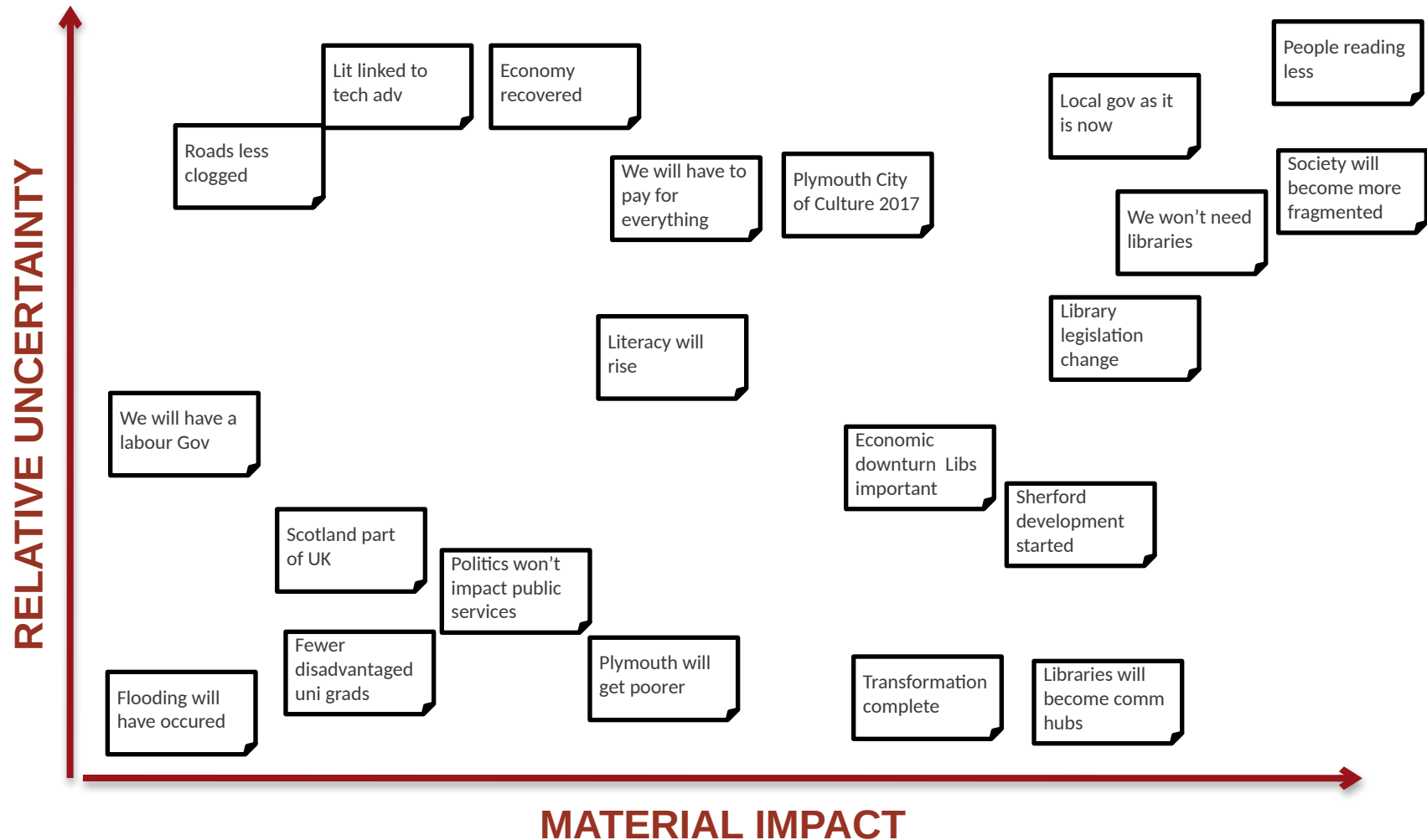
Post-its of uncertainties



Post-its of certainties

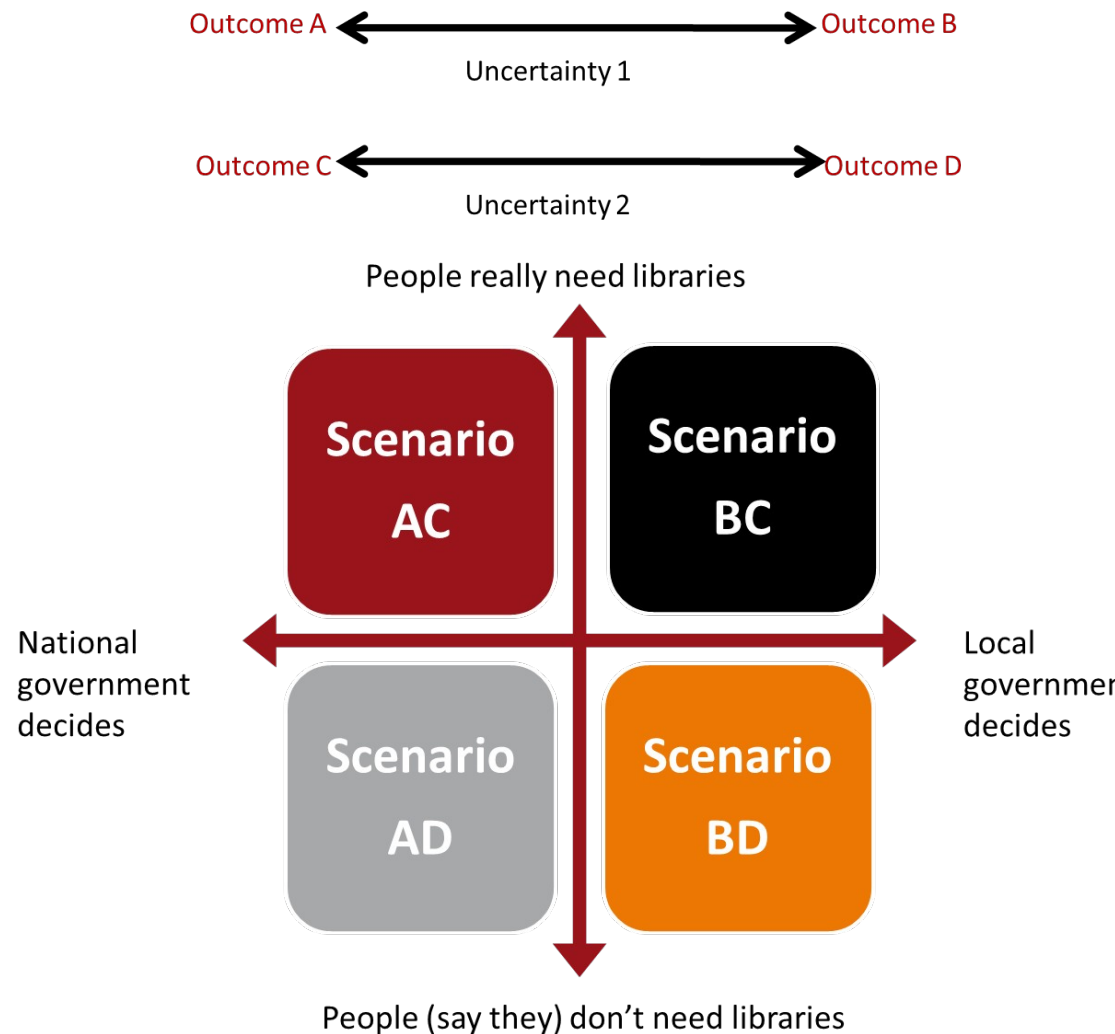


Example of uncertainties organised



Scenario plot based on axes

- Identify the two most critical uncertainties and treat them as simple bipolar variables.
- Identify scenarios
- Now make the scenarios more concrete by fleshing them out into imaginary, but plausible, stories that reflect the forces at play.
- Write a scenario narration explaining what has happened and provide your reasoning. This will help with further analysis.
- One technique: tell a group story. One person starts with first line – each group member adds a line in turn.



TIP – The Integral Process

Perceptual complexity, visioning and alignment

- A multi-layered approach that integrates perspectives and developmental models to tackle complex societal and organisational issues.
- Applied in resolving multi-stakeholder challenges and developmental strategy.
- Developed by Sara Nora Ross, combining systems thinking and integral theory.
- Adaptive process: Uses developmental mapping and collaborative inquiry to align goals.
- Distinctive for its focus on integrating diverse perspectives and understanding complexity developmentally.
- Develops groups in Model of Hierarchical Complexity evaluation.

TIP Step	Purpose	Product or Outcome
1	Develop informed basis to select starting point(s)	Map of the territory.
2	Surface & deliberate differing assumptions that could later confuse or create conflicts.	Alignment toward the goal with clarity about differences.
3	Identify factors of complex causation.	Summary Description of the Issue.
4	Recognize comprehensiveness of action required & what to include.	An “action-system” i.e., a systemic to-do list.
5	Develop the reasoning behind a selected Issue-Question.	A specific question needing deliberative decision-making
6	Expose the array of approaches to the Issue-Question that are driven by different perspectives on it.	Framework of Approaches via template assuring all perspectives are included.
7	Create an informed basis for complex decisions.	Deliberation; Decision Matrix; Decision-making.
8	Assure coordination.	Communication/feedback loops.
9	Effective systemic action, change, or development.	Institutionalization to sustain effort.

Concerned with *development* as well as (and to) deal with complexity

Cognitive Edge Methods Cynefin / SenseMaker

Perceptual complexity, solutions design

- A set of narrative-driven sense-making tools, including the Cynefin framework, for managing complexity and uncertainty.
- Used in organisational strategy, innovation, and systems change.
- Developed by Dave Snowden, it is actively used in organisations managing complex systems.
- Emergent and Adaptive: Facilitates collective sense-making through workshops and participatory analysis.
- Unique for leveraging narrative data to explore patterns and inform decision-making.

SenseMaker® QuickSense in a nutshell

Blended Research:
Combines qualitative stories and quantitative data for a complete view.

Easy to Use:
No deep expertise needed; comes with an automated process and handbook.

Quick Insights:
Respondents analyze their experiences, with results shown graphically.

Customizable:
Offers basic to advanced options, including dashboards and detailed reports.

Narrative Focused: Uses storytelling to reveal authentic insights and hidden dynamics.

Polarity Management

Perceptual complexity, solutions design

Focuses on managing interdependent and opposing values (polarities) within systems to achieve balance.

Applied in organisational strategy, leadership development, and conflict resolution.

Developed by Barry Johnson, with tools like polarity maps widely used.

Structured methodology:

Guides groups in identifying, mapping, and managing polarities.

Unique for addressing 'unsolvable problems' by leveraging the tension between polarities constructively.

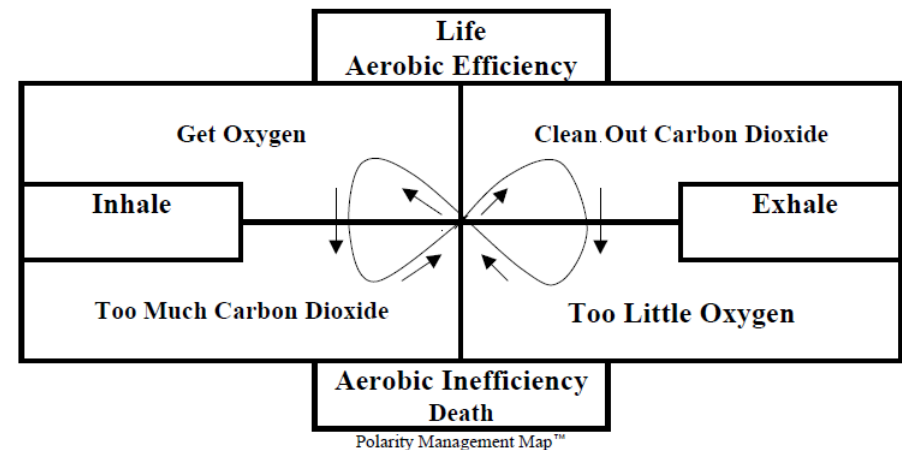
Framework: Uses the Polarity Map, a visual tool that helps groups identify the upsides and downsides of each pole, guiding participants to leverage the strengths of both while minimising the weaknesses.

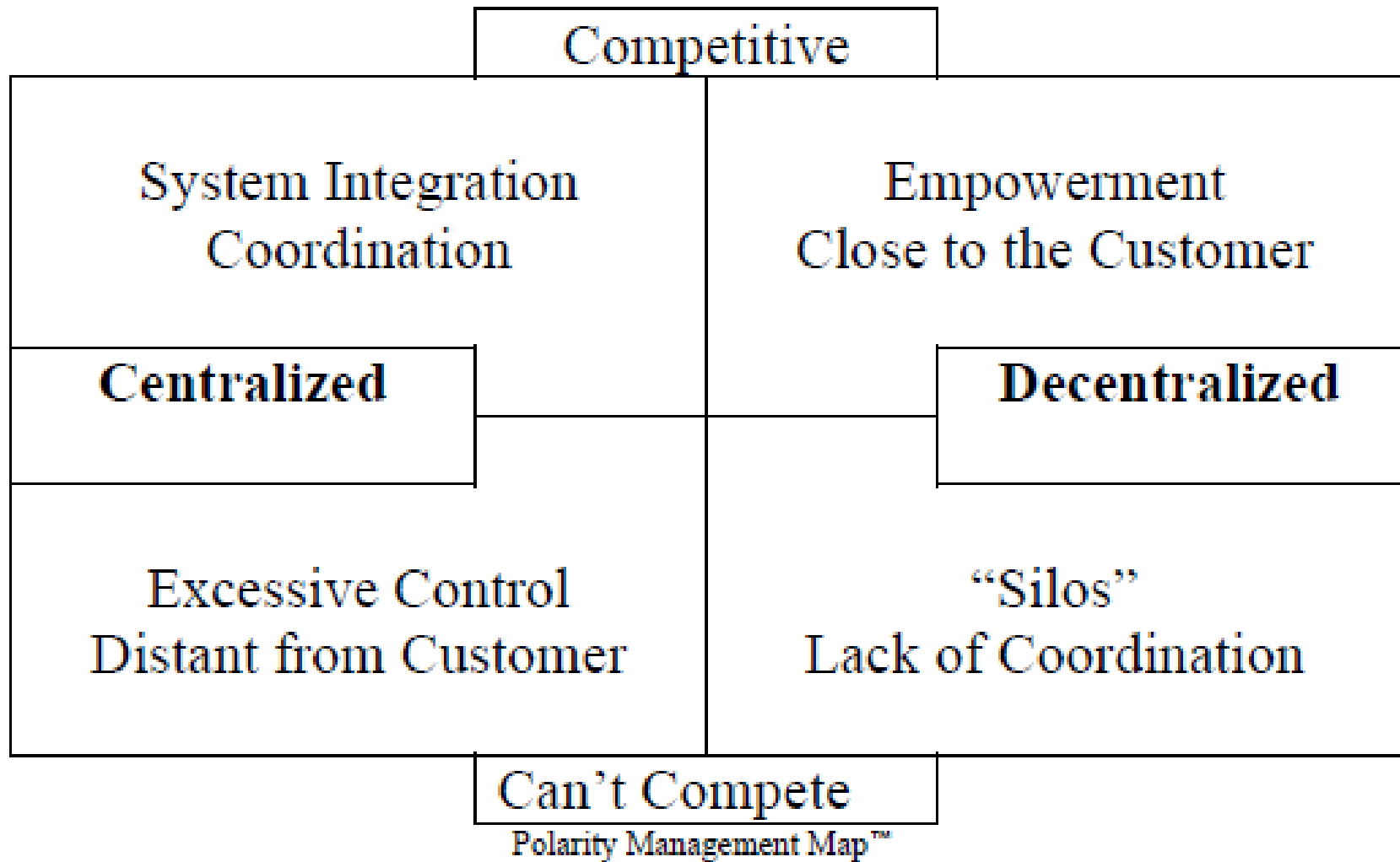
Ideal for addressing complex, 'both/and' tensions in organisations or communities, such as innovation vs.

tradition or local vs. global priorities, where competing needs coexist.

Large group process: engages diverse stakeholders to map their perspectives, collectively explore tensions, and co-create strategies for managing polarities over time.

Outcome: Builds shared understanding, enhances collective decision-making, and fosters sustainable collaboration by aligning group awareness around dynamic systems and interdependencies.





Action Steps

How will we gain or maintain the positive results from focusing on this left pole?
What? Who? By When? Measures?

- Develop relationships with faculty and residents.
- Daily review of course material that will be on exams.
- Learn the Department chair's expectation of what a student clinician should and should not do.
- Reflect weekly on how well I am maintaining appropriate rapport in patient relationships.

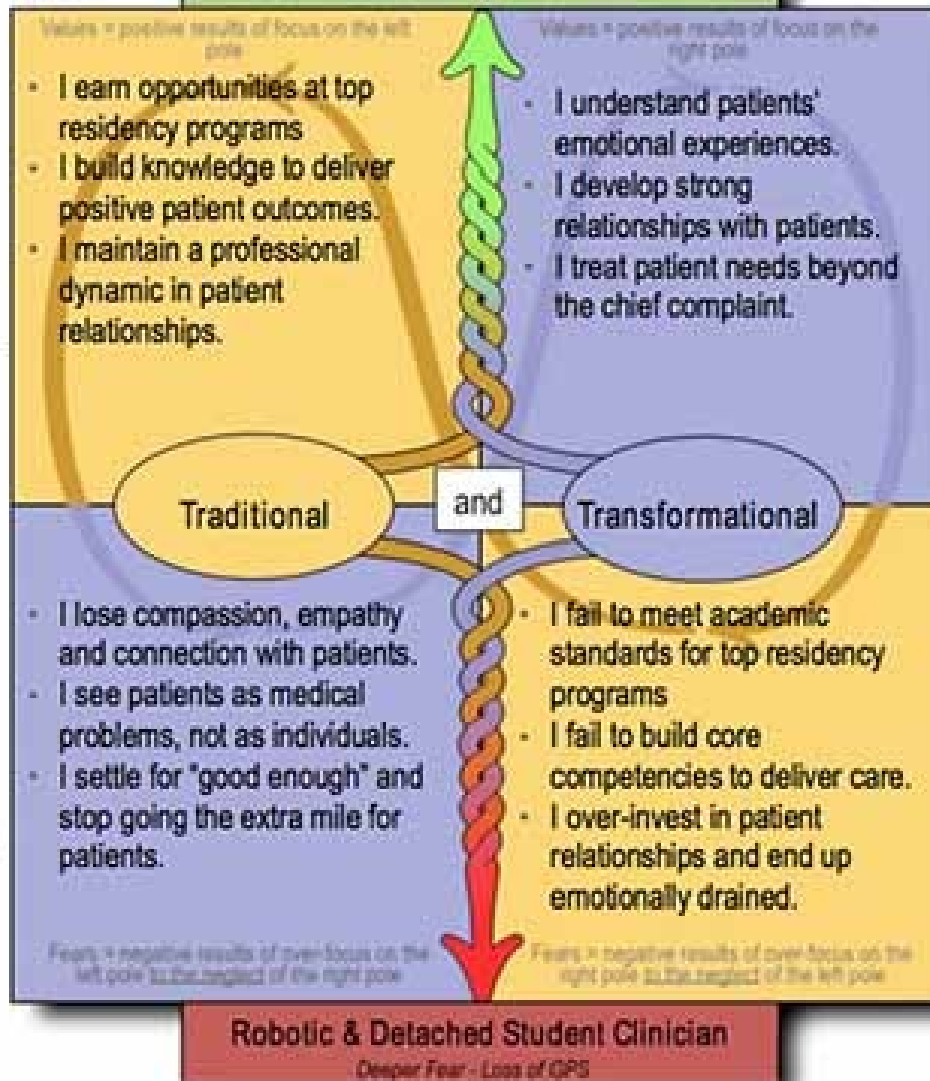
Early Warnings

Measurable indicators (things you can count) that will let you know that you are getting into the downside of this left pole.

- "You don't really care about me. I'm just a chart."
- I struggle to build rapport with my patients.
- Residents and attendings express that I come across as being disengaged in patient interaction.
- I feel cynical and think "I guess they were right. Medical students do lose their empathy."

Greater Purpose Statement (GPS) - Why leverage this polarity?

Active & Engaged Student Clinician



Action Steps

How will we gain or maintain the positive results from focusing on this right pole?
What? Who? By When? Measures?

- Weekly reflection on patient interactions.
- Create monthly opportunities to come together with other students and discuss emotional experiences.
- Seek regular feedback from superiors on interpersonal skills in clinical setting.
- Meet every three weeks with mentors for guidance.

Early Warnings

Measurable indicators (things you can count) that will let you know that you are getting into the downside of this right pole.

- "I have nothing left to give."
- I receive negative feedback such as "Strong communication skills, lacks the knowledge base."
- Low confidence and high anxiety around pulling together assessments and plans.
- Consistent test scores that reflect mediocre understanding of course material.

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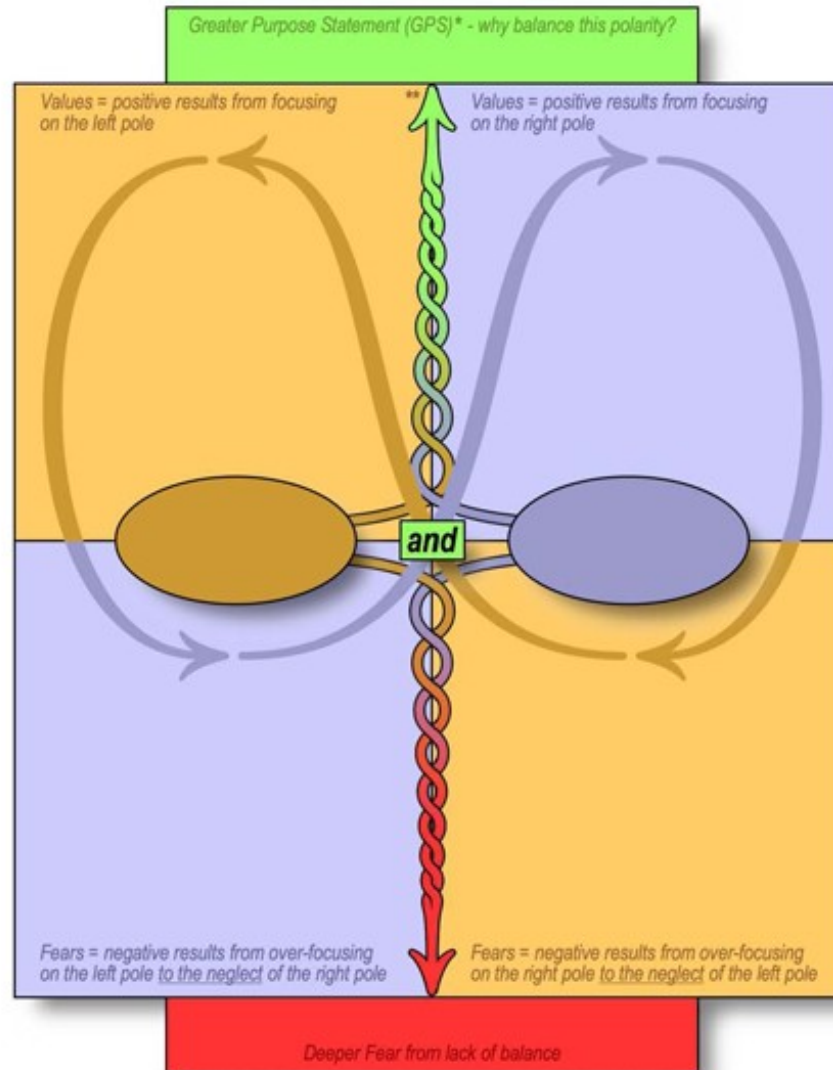
Polarity Map

Action Steps

How will we gain or maintain the positive results from focusing on this left pole?
What? Who? By When? Measures?

Early Warnings***

Measurable indicators (things you can count) that will let you know that you are getting into the downside of this left pole.



Polarity Map™ © 1992, 2008 Polarity Management Associates, LLC / * Thanks to John Scherer, The Scherer Leadership Center / ** Thanks to De Wit & Meyer BV / *** Thanks to Todd Johnson, Riverbend Consultants

Action Steps

How will we gain or maintain the positive results from focusing on this right pole?
What? Who? By When? Measures?

Early Warnings

Measurable indicators (things you can count) that will let you know that you are getting into the downside of this right pole.

Citizen Assemblies and Variants

Perceptual complexity, solutions design

- Structured forums where a representative sample of citizens deliberates on societal issues and makes recommendations.
- Commonly applied in policy-making, governance, and addressing complex social challenges.
- Originated in democratic practices; variants include Citizens' Juries and Deliberative Polling.
- Facilitator-driven process: Combines expert input, group deliberation, and democratic decision-making.
- Unique for its emphasis on inclusivity and informed decision-making by ordinary citizens.

Process:

- Recruit
- Setup the space
- Meet and greet: make attendees feel welcome and comfortable, sign in
- Welcome: lead facilitators introduce themselves, explain the running order, and introduce an icebreaker activity
- First discussion: small groups discuss what's good and not so good about their area and country, followed by feedback.
- Second discussion: small groups discuss what they want their community candidate to do, followed by feedback and voting on top priorities.
- Connect in to cause / candidate
- Finishing up: facilitators thank everyone, and invite enthusiastic participants to the next organizers' meeting

Art of Hosting

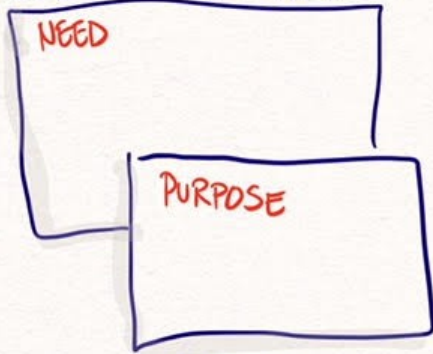
Perceptual complexity, emergent change

- A facilitation framework using participatory leadership techniques to foster collaboration and collective intelligence.
- Applied in community development, organisational transformation, and stakeholder engagement.
- Emergent and Adaptive: Combines dialogue-based practices like World Café and ProAction Café.
- Self-organised: Encourages shared ownership of outcomes and participatory leadership.
- Known for blending various collaborative techniques into a flexible framework.



DWA - TEMPLATE

WHY ARE WE DOING THIS?



WHO IS THE CORE TEAM?

SPONSOR / CLIENT
(ROLE, MANDATE)



WHO ARE THE PARTICIPANTS?

WHAT DO WE NEED TO DO?
BEFORE

INVITATION

DURING (DESIGN)



AFTER (FOLLOW THROUGH)



WHAT IS THE OUTCOME?

HARVEST

INTANGIBLE	TANGIBLE	
		INDIVIDUAL
		COLLECTIVE

I NEED HELP TO:

UNANSWERED QUESTIONS
? ? ?

INSIGHTS



NEXT STEPS



Deep Democracy (Lewis Method)

Perceptual complexity, emergent change

- A facilitation approach that surfaces and integrates all voices, especially minority perspectives, in decision-making.
 - Applied in conflict resolution, team dynamics, and organisational culture.
 - Developed by Arnold and Amy Mindell, widely adopted in organisations addressing systemic conflicts.
 - Facilitator-driven: Uses structured tools like 'voting with your feet' and role-reversal exercises.
 - Unique for its focus on integrating diverse perspectives to create deeper alignment.
1. Collect all perspectives (even those opposing your own)
 2. Actively look for the alternative voices (does anybody think something completely different?)
 3. Spread the alternative (who shares this opinion?)
 4. Add the wisdom of the minority to the decision of the majority (what do you need to go along with the decision of the majority?)
 5. Dive into the unconscious

Gurteen Knowledge Café

Perceptual complexity, emergent change

- A conversational method for sharing knowledge, fostering learning, and generating collective insight.
- Used in knowledge management, organisational learning, and strategy discussions.
- Developed by David Gurteen, widely used in organisations and knowledge networks.
- Emergent process: Structured yet informal dialogue to surface collective intelligence.
- Known for its simplicity and focus on conversational learning.
- This approach emphasizes dialogue over debate, encouraging participants to suspend assumptions, listen actively, and explore diverse perspectives. The goal is to surface collective knowledge, build relationships, and enhance understanding, which can lead to improved decision-making and innovation.

Knowledge Café method

Preparation:

1. **Venue:** Choose a comfortable space with small tables seating 4–5 participants each, arranged to foster informal discussion.
2. **Participants:** Aim for 16–32 attendees to ensure diverse perspectives while maintaining an intimate setting.
3. **Facilitator:** Select an individual to guide the session; professional facilitation skills are not mandatory.
4. **Question:** Develop a compelling, open-ended question relevant to the group's interests to stimulate meaningful conversation.

Introduction (10–20 minutes):

1. The facilitator introduces the Knowledge Café concept, clarifies its purpose, and presents the central question.
2. If applicable, a guest speaker may provide a brief talk to contextualize the topic, but this should be concise to maximize discussion time.

Small Group Conversations (30–60 minutes):

1. Participants engage in discussions at their tables, exploring the posed question.
2. After 10–20 minutes, the facilitator prompts participants to switch tables and mix with different individuals, typically repeating this process two or three times to encourage diverse interactions.

Whole Group Conversation (15–30 minutes):

1. All participants reconvene in a circle to share insights and reflections from their small group discussions.
2. The facilitator ensures an open forum where everyone can contribute, fostering a collective dialogue without dominating the conversation.

Conclusion:

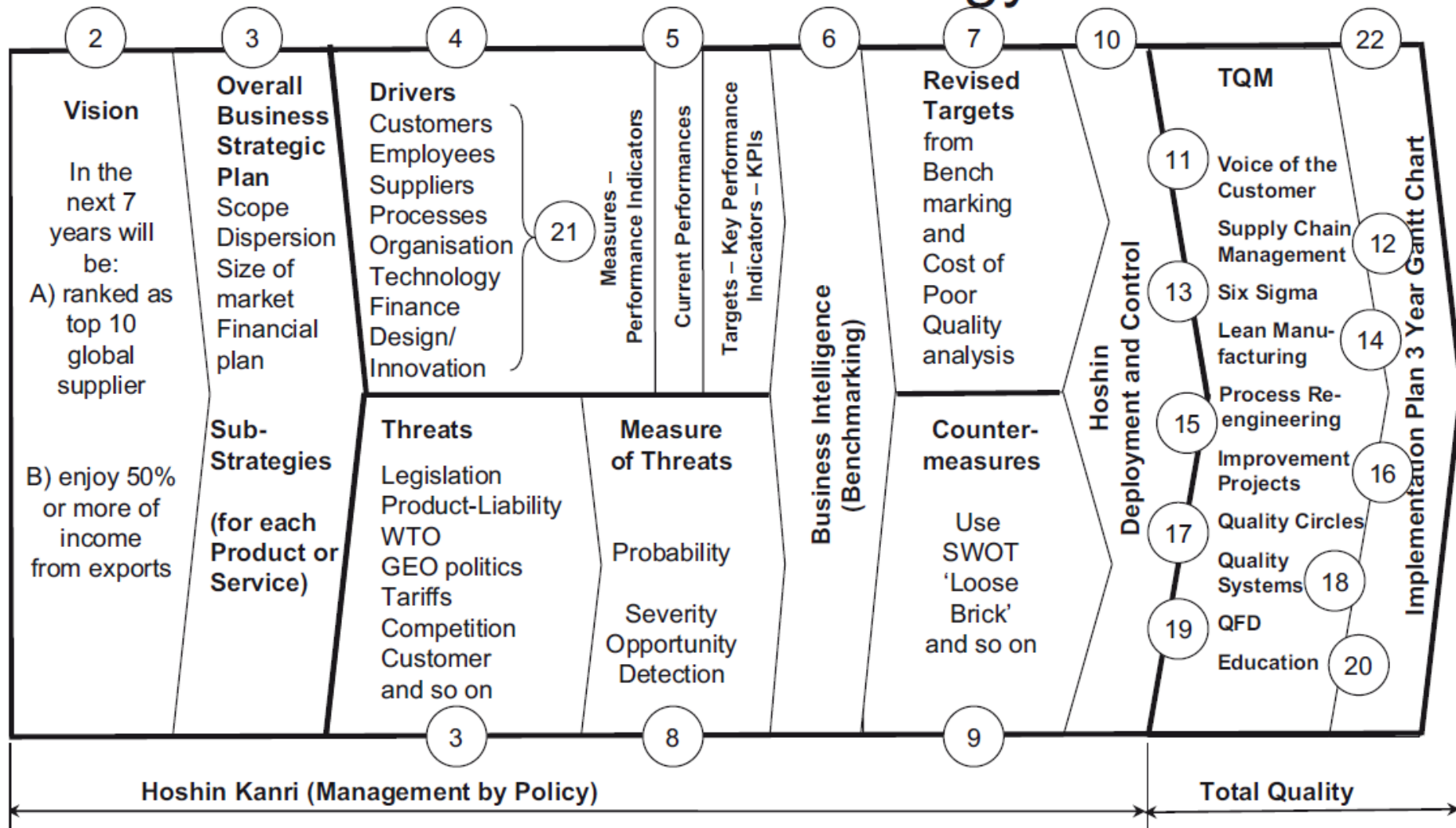
1. The facilitator summarizes key themes and thanks participants for their engagement.
2. No formal recording of the discussions is necessary; the emphasis is on the conversational process and the insights gained.

Hoshin Kanri

Structural complexity, visioning and alignment

- A strategic planning method aligning organisational goals across all levels through iterative cycles.
 - Used in operational strategy, continuous improvement, and organisational alignment.
 - Originated in Japan and widely used in lean organisations.
 - Structured methodology: Combines long-term goals with iterative feedback loops (Plan-Do-Check-Act cycles).
 - Unique for cascading strategy from leadership to operations, ensuring alignment at all levels.
1. Planning and Communication: This phase includes setting the course and getting involvement from all levels of the organization, using tools like the X-Chart.
 2. Project Initiation and Execution: Focuses on creating a project charter, defining accountability, and conducting weekly project reviews to track progress.
 3. Reflection: Emphasizes assessing what worked and what didn't, with leaders playing a crucial role in ensuring lessons are learned and applied.
 4. Lean Philosophy: Hoshin Kanri builds on the Lean Philosophy, serving as a visual tool to drive the right conversations at the right time.
 5. Breakthrough Objectives: Focuses on achieving breakthrough objectives through a disciplined and structured approach, involving the entire organization.
 6. Continuous Improvement: Integrates Total Quality Management (TQM) to achieve goals, emphasizing the involvement and recognition of every employee's expertise.

Hoshin Kanri – from Strategy to Action!



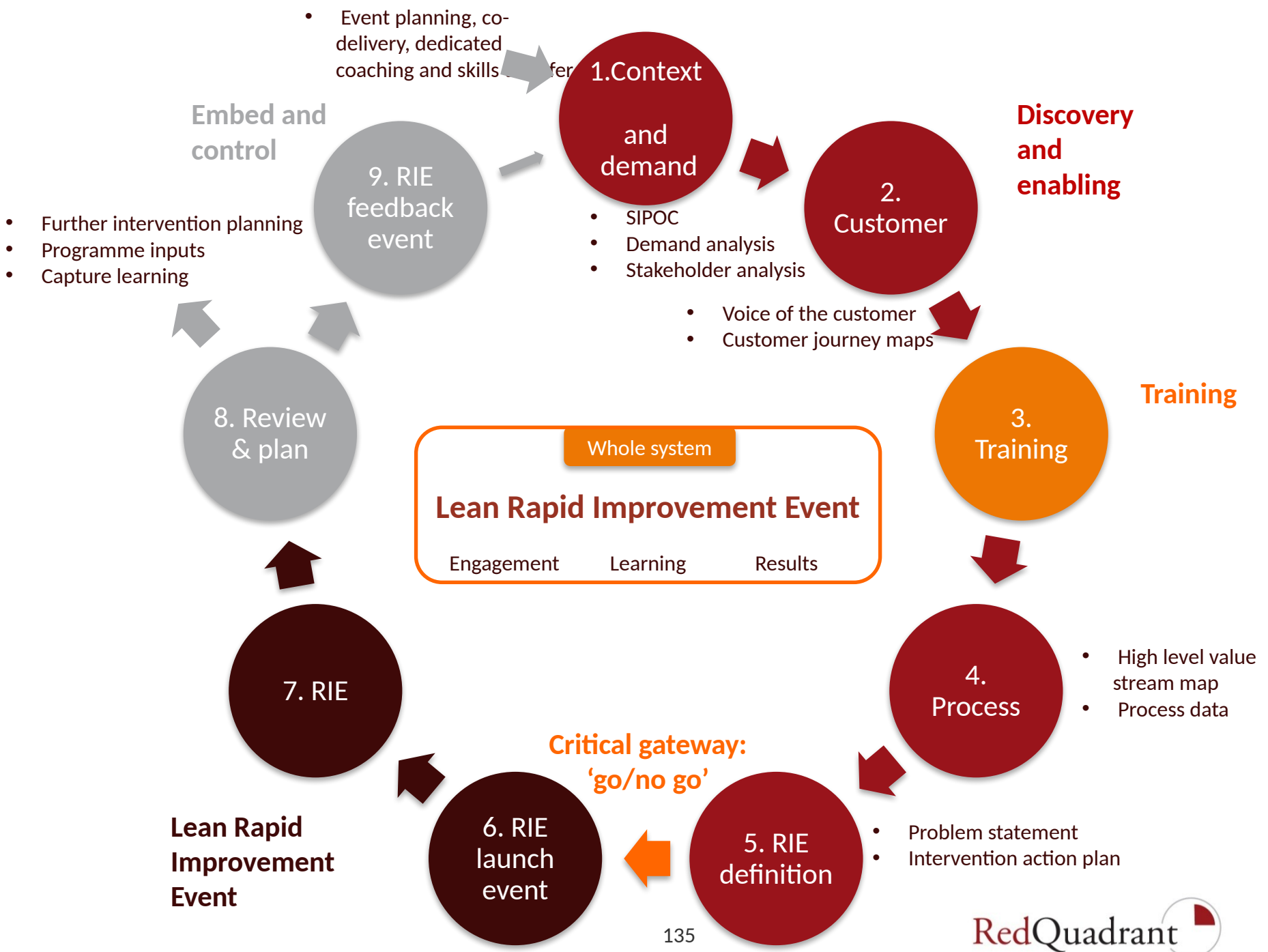
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Rapid Improvement Events / GE Work-Out etc

Structural complexity, solutions design

- Structured, time-bound workshops designed to address specific organisational challenges by streamlining processes and improving efficiency.
- Used in lean manufacturing, process improvement, and team-based problem-solving.
- Popularised by General Electric as the 'Work-Out' process, now adapted widely.
- Structured methodology: Teams identify issues, brainstorm solutions, and develop action plans within a few days.
- Unique for empowering teams to make real-time decisions and implement changes immediately.



Participatory Innovation Model

Perceptual complexity, solutions design

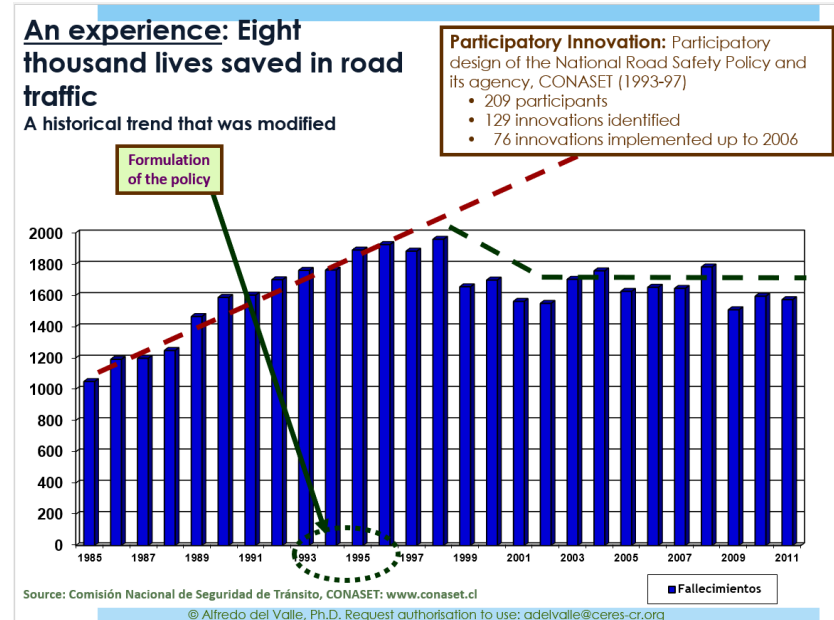
A stakeholder-driven approach to co-creating innovative solutions to 'wicked problems' by integrating diverse perspectives.

Used in organisational strategy, product development, and systems innovation.

Emergent and adaptive: combines participatory design principles with collaborative innovation practices and portfolio style delivery.

Facilitator-driven: engages cross-functional teams and stakeholders to co-create ideas.

Unique for its focus on stakeholder inclusivity and fostering co-created innovation.

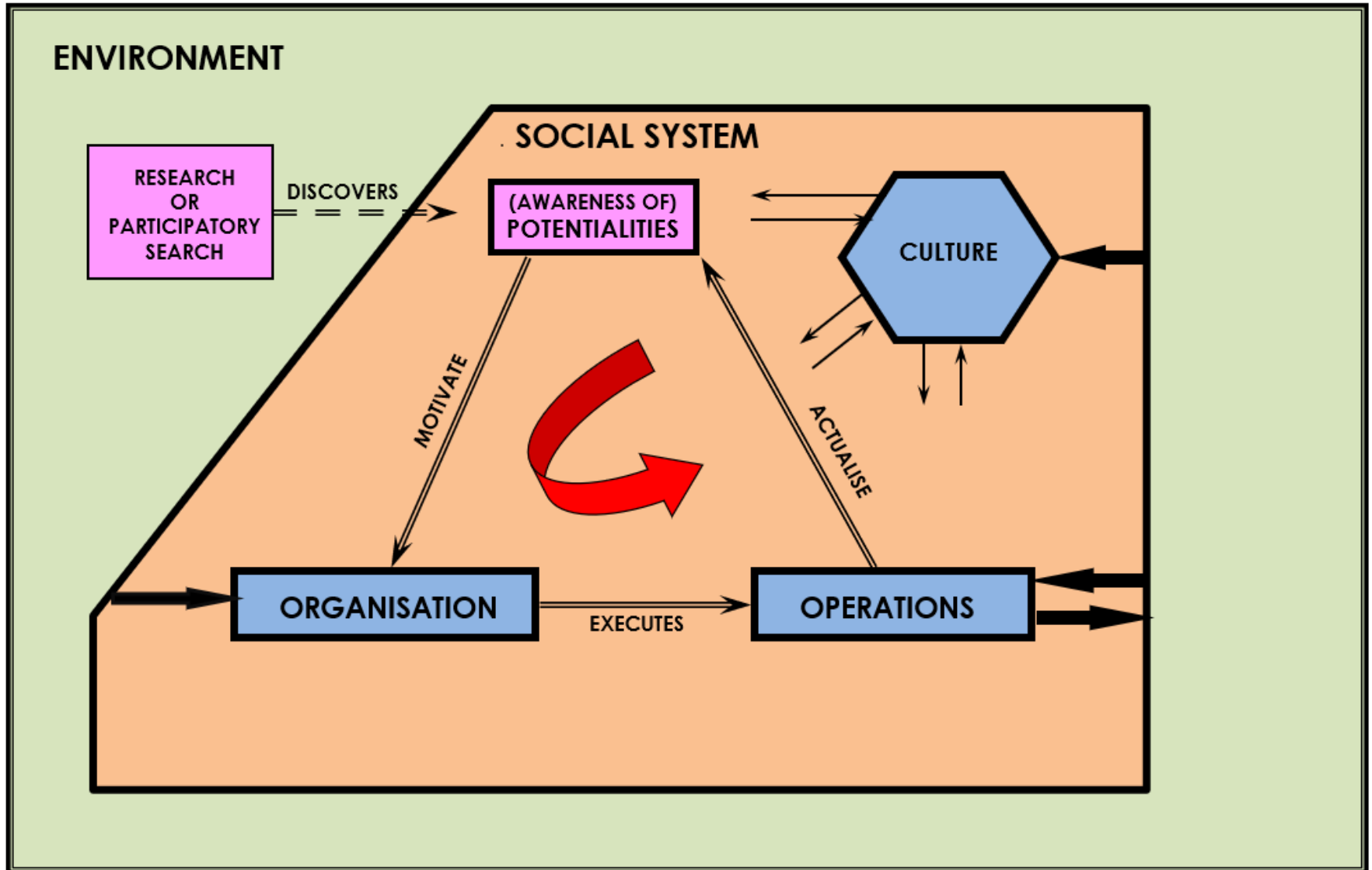


Action Map (1993):

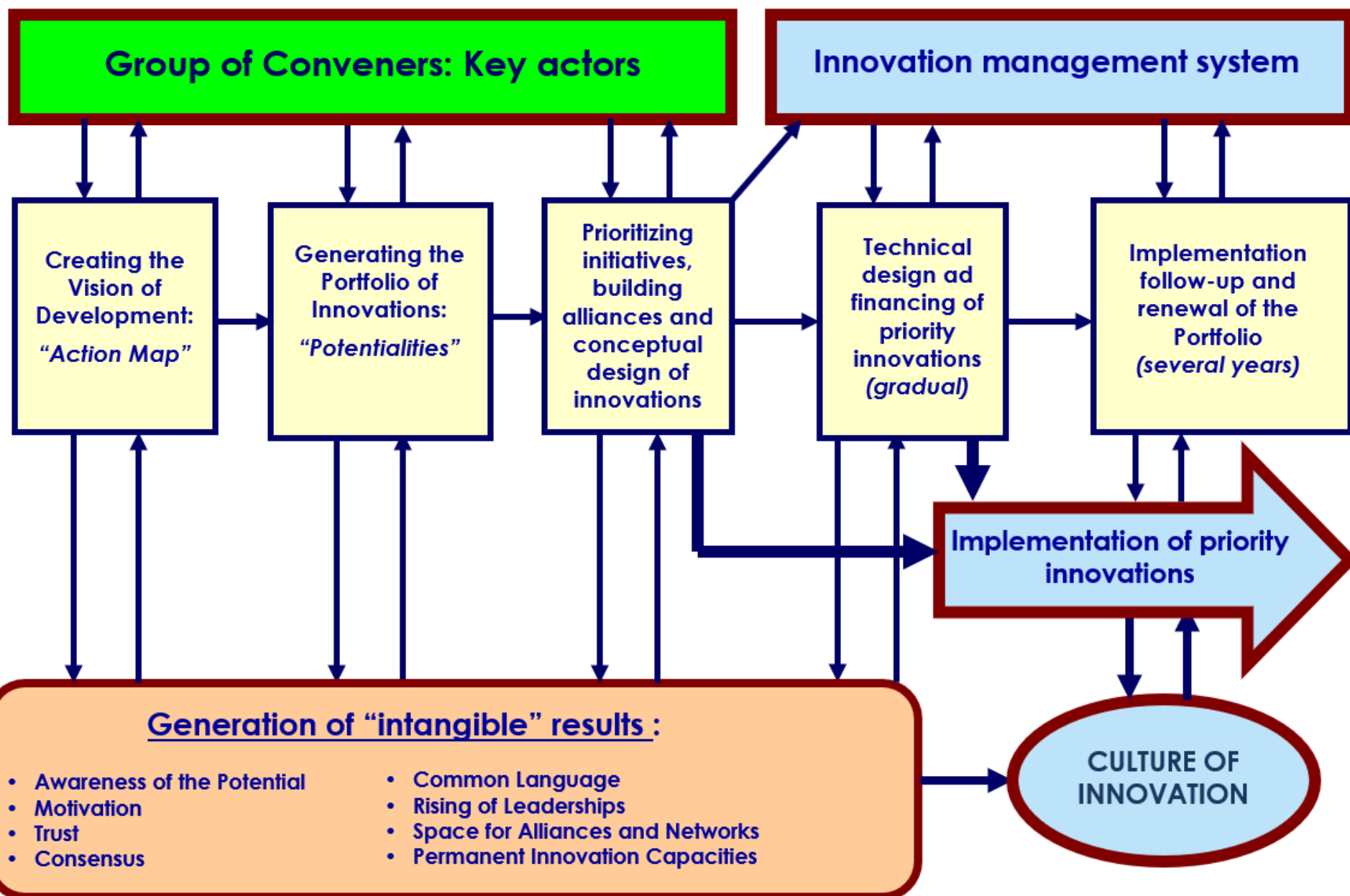
THE NATIONAL ROAD SAFETY SYSTEM OF CHILE

A Training and certification of drivers A-1 Training professional drivers A-2 Training particular drivers A-3 CERTIFICATION OF DRIVERS A-4 Training driving instructors A-5 CERTIFICATION OF INSTRUCTORS A-6 Certification of examiners A-7 CONTROL OF DRIVING SCHOOLS A-8 Permanent qualification of drivers	D Management of transport services D-1 Compensation regime D-2 Working hours and conditions of service D-3 Permanent qualification of drivers D-4 Stowage and dangerous loads D-5 School transport conditions	G Accident care and insurance G-1 Integrated rescue system G-2 Integrated rehabilitation system G-3 Insurance coverage
B Management of vehicle quality B-1 Technical specifications B-2 Safety equipment B-3 Certification of new vehicles B-4 Effective technical inspection B-5 Control of inspection plants B-6 Control of maintenance workshops B-7 Training of mechanics	E Enforcement E-1 CONTROL OF DRIVERS E-2 Inspection of vehicles E-3 Inspection of road conditions E-4 Control of transport services E-5 Control of pedestrians E-6 Enforcement by the citizens	H Research and information H-1 Integrated information system H-2 REGISTER OF DRIVERS AND OFFENDERS H-3 REGISTER OF VEHICLES H-4 Register of accidents H-5 Register of instructors and examiners H-6 Studies of accident-producing factors H-7 Effective information to users
C Management of roads and public spaces C-1 Traffic management C-2 Management of traffic signals C-3 Updating of designs C-4 Maintenance C-5 Road safety implements C-6 Stops and rest areas C-7 Facilities for pedestrians C-8 Facilities for cyclists C-9 Location of activities	F Judicial Action F-1 PENALIZING INFRACTIONS F-2 Effective system of penalties F-3 Broadening competences of local judges F-4 Administrative decongestion of lower courts F-5 ACCIDENT INVESTIGATION AND EXPERT REPORTING F-7 Civil accountability of the State	I Education and communications I-1 Incorporation into the al curriculum I-2 Training of teachers I-3 Preparation de of teaching material I-4 Protection of school children I-5 DISSEMINATION CAMPAIGNS

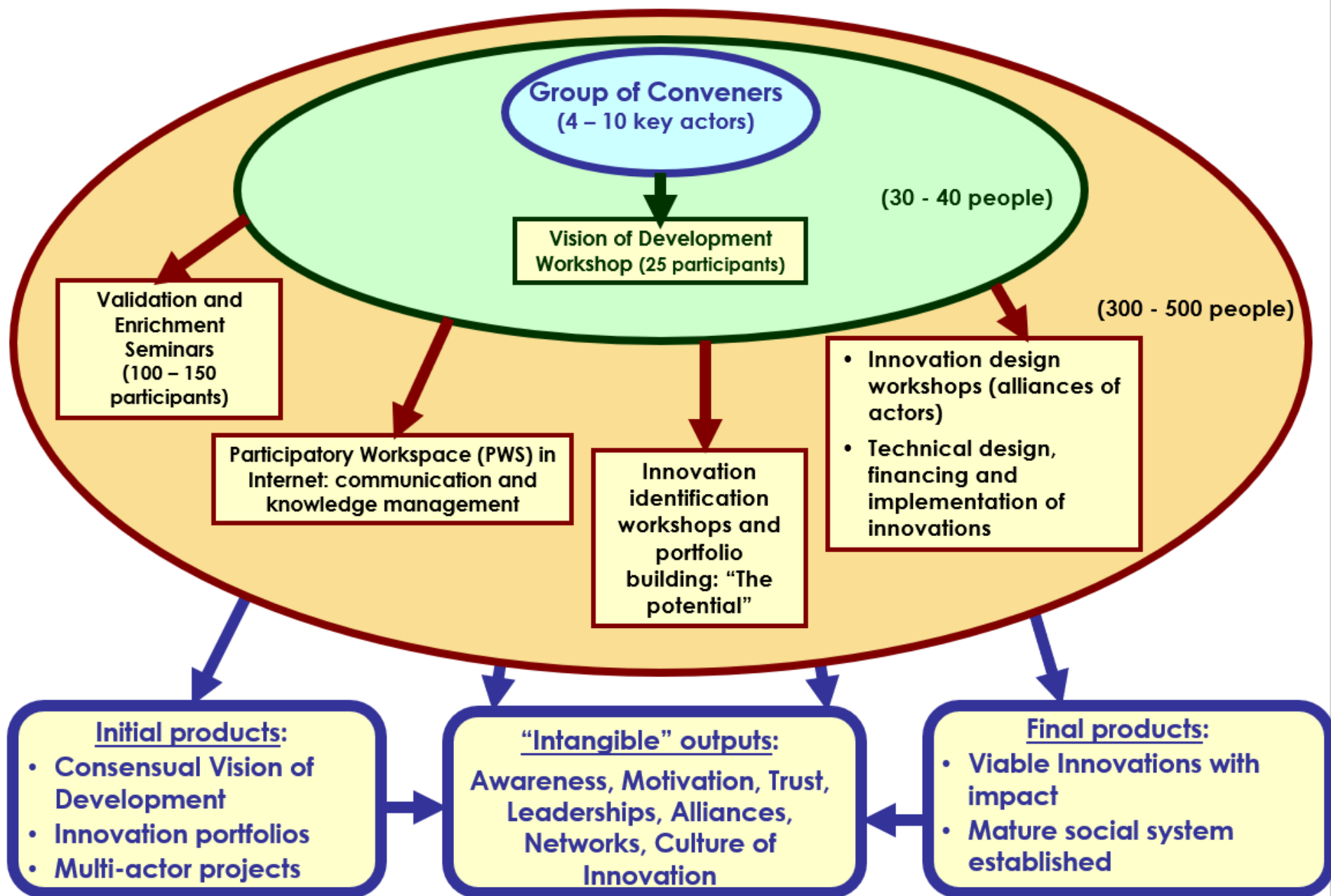
The cycle of innovation



The Participatory Innovation Process: Building up development



Another view of the process



Triple Task Approach

Structural complexity, emergent change

- Balances action, reflection, and group engagement to enable adaptive responses to systemic challenges.
- Applied in organisational learning, strategic planning, and team development.
- Developed as a meta-framework for engaging diverse stakeholders.
- Structured methodology: Participants alternate between collective tasks, reflective discussions, and planning cycles.
- Distinctive for its integration of reflective practice with actionable outcomes.

GroupWorks Patterns

Structural complexity, emergent change

- A set of design principles and tools for creating effective group processes in meetings, workshops, and collaborative events.
- Used in facilitation, organisational design, and participatory processes.
- Emerged from collaborative efforts by facilitators to document best practices.
- Emergent and Adaptive: Encourages facilitators to select and combine patterns suited to specific contexts.
- Known for its visual frameworks and adaptability across diverse facilitation challenges.

Interactive Planning

Dynamic complexity, visioning and alignment

- A method to address complex organisational issues by focusing on idealised designs and collaborative planning.
- Commonly used in strategic planning, systems change, and innovation.
- Developed by Russell Ackoff, it combines systems thinking with participatory processes.
- Structured methodology: Participants envision ideal systems and backcast to identify actionable steps.
- Known for integrating systemic and participatory approaches to achieve alignment and adaptability.

Search Conference

Dynamic complexity, visioning and alignment

- A participatory approach to align diverse stakeholders on shared goals and actions through future-focused dialogue.
- Used in community development, organisational transformation, and policy design.
- Developed in the 1950s by Fred Emery and Eric Trist, it remains widely used in change processes.
- Structured methodology: Focuses on exploring shared challenges, envisioning desired futures, and creating actionable plans.
- Unique for its emphasis on co-creation and collective ownership of outcomes.

Large scale interactive process (LSIP)

Dynamic complexity, visioning and alignment

- A participatory method designed to enable large groups of stakeholders to co-create strategic visions and drive rapid organisational alignment.
- Involves highly structured, dynamic meetings where diverse participants generate ideas, prioritise actions, and commit to implementation.
- Focuses on simultaneous large-scale involvement, enabling rapid decision-making and alignment.
- Uses visual tools and structured facilitation to manage complexity and create shared understanding.
- Often used for organisational strategy development, change management, and cultural transformation, notably in multinational corporations, public sector transformations, and major project planning.
- The ability to quickly align diverse stakeholders on strategic goals and actionable plans sets it apart, particularly in contexts requiring rapid systemic change and broad engagement.

Liberating Structures

Dynamic complexity, solutions design

- A toolkit of participatory methods designed to foster creativity, collaboration, and inclusivity in groups of any size.
- Applied in organisational innovation, team building, and stakeholder engagement.
- Developed by Henri Lipmanowicz and Keith McCandless, it remains widely used across industries.
- Emergent and Adaptive: Combines modular techniques (e.g., 1-2-4-All, Troika Consulting) to suit specific contexts.
- Distinctive for its simplicity, scalability, and ability to engage all participants equally.

www.liberatingstructures.com

Fast Cycle Full Participation

Dynamic complexity, solutions design

- A high-speed collaborative decision-making approach involving all relevant stakeholders in intensive, focused sessions.
- Used in corporate strategy, crisis response, and large-scale planning.
- Developed to integrate speed with inclusivity in decision-making.
- Whole-System Inclusion: Ensures that all participants have input in real-time decision-making.
- Known for balancing rapid outcomes with broad participation.

Warm Data Labs / People Need People

Dynamic complexity, emergent change

- A relational process for exploring systemic complexity through conversational inquiry and shared understanding.
- Applied in systemic change, organisational learning, and community engagement.
- Developed by Nora Bateson, it focuses on the 'warm' interdependencies between system components.
- Emergent and Adaptive: Uses open-ended, non-linear conversations to uncover relational dynamics.
- Distinctive for its emphasis on exploring relationships and fostering deep systemic insight.

Constellations

Dynamic complexity, emergent change

- A systemic mapping process that visually and spatially represents relationships, dynamics, and patterns within a system.
- Applied in conflict resolution, leadership development, and systemic change.
- Emergent and Adaptive: Participants create spatial representations to explore hidden dynamics and interconnections.
- Facilitator-driven: Requires skilled facilitation to guide insights and transformative actions.
- Unique for revealing underlying tensions and fostering systemic healing.

Collaborative Development Action Inquiry (CDAI)

Dynamic complexity, emergent change

- A participatory method integrating reflection and action to foster learning and systemic transformation.
- Applied in organisational change, leadership development, and systems learning.
- Developed by William Torbert, combining inquiry cycles with group action.
- Facilitator-driven: Encourages deep dialogue and iterative reflection-action loops.
- Known for its integration of developmental learning with practical outcomes.

Power+Systems TOOTs

Dynamic complexity, emergent change

- Experiential workshops designed to explore systemic behaviours and power dynamics within organisations.
- Used in leadership development, cultural transformation, and organisational learning.
- Developed by Barry Oshry, it uses structured simulations to reveal systemic patterns.
- Facilitator-driven: Participants enact roles to surface insights into power and systemic relationships.
- Unique for exposing hidden organisational dynamics and fostering behavioural awareness.

‘To create a setting in which all members of the system can become clearer about how the system is experienced from many different vantage points.’

TOOT guidelines:

- + No Work
- + Speak Through Me
- + Tell the Truth
- + Listen Carefully to Others
- + No Stories

Theory U

Dynamic complexity, emergent change

- A change methodology for sensing and addressing deep-rooted systemic challenges by moving through phases of observing, presencing, and prototyping.
- Used in leadership transformation, social innovation, and systems change.
- Developed by Otto Scharmer and the Presencing Institute, widely adopted in corporate, education, and community settings.
- Emergent and Adaptive: Combines deep listening, reflective practice, and co-creation of new solutions.
- Distinctive for its focus on transformational processes and 'presencing' to access future possibilities.

Core techniques:

- Case Clinic
- Dialogue Interview
- Guided Journaling
- Prototyping
- Sensing Journey
- Shadowing
- Stakeholder Interviews
- Social Presencing Theatre

'Theory U proposes that the quality of the results that we create in any kind of social system is a function of the quality of awareness, attention, or consciousness that the participants in the system operate from.'

Seven leadership capabilities

- Holding the space of listening: Listening to yourself, others and to what is emerging from the collective.
- Observing: Suspend the voice of judgement and observe what is rather than a projection. (mindfulness skills)
- Sensing: Requires the tuning of three instruments: the open mind, the open heart, and the open will.
- Presencing: Connect to the deepest source of self and will allows the future to emerge from the whole rather than from a smaller part or special interest group
- Crystalizing: When a small group of key persons commits itself to the purpose and outcomes of a project, the power of their intention creates an energy field that attracts people, opportunities, and resources that make things happen. This core group functions as a vehicle for the whole to manifest.
- Prototyping: Moving down the left side of the U requires the group to open up and deal with the resistance of thought, emotion, and will; moving up the right side requires the integration of thinking, feeling, and will in the context of practical applications and learning by doing.
- Performing: Organizations need to perform at this macro level: they need to convene the right sets of players (frontline people who are connected through the same value chain) and to engage a social technology that allows a multi-stakeholder gathering to shift from debating to co-creating the new.

Field	Micro:	Meso:	Macro:	Mundo:
Structure of Attention	THINKING (individual)	CONVERSING (group)	STRUCTURING (institutions)	ECOSYSTEM COORDINATING (global systems)

Field 1: Operating from the old me-world	Listening 1: Downloading habits of thought	Downloading: Talking nice, politeness rule-reenacting	Centralized: Machine bureaucracy	Hierarchy: Central plan
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Field 2: Operating from the current it-world	Listening 2 : Factual, object-focused	Debate: Talking tough rule-revealing	Decentralized: Divisionalized	Market: Competition
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Field 3: Operating from current you-world	Listening 3: Empathic listening	Dialogue Inquiry rule-reflecting	Networked Relational	Dialogue: Mutual adjustment
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Field 4: Operating from the highest future possibility that is wanting to emerge	Listening 4: Generative listening	Presencing Collective creativity, flow rule-generating	Ecosystem Ba	Collective Presence: Seeing from the emerging Whole
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1. CO-INITIATING:

Build Common Intent stop and listen to others and to what life calls you to do

5. CO-EVOLVING:

Embody the New in Ecosystems that facilitate seeing and acting from the whole

2. CO-SENSING:

Observe, Observe, Observe go to the places of most potential and listen with your mind and heart wide open

4. CO-CREATING:

Prototype the New in living examples to explore the future by doing

3. PRESENCING:

Connect to the Source of Inspiration, and Will
go to the place of silence and allow the inner knowing to emerge

Social Presencing Theatre (and related methods)

Dynamic complexity, emergent change

- A body-based approach to sensing systemic dynamics and facilitating change through embodied awareness and movement.
- Applied in organisational transformation, leadership development, and systems change.
- Developed by Arawana Hayashi and integrated into Theory U practices.
- Emergent and Adaptive: Uses physical movement to represent and explore the dynamics of social systems.
- Unique for its focus on embodied intelligence and uncovering hidden systemic patterns.

KEY PRACTICES



20 Minute Dance

A mindfulness of body practice. It enhances the ability to synchronize body and mind by noticing the mind's habit of wandering and supporting groundedness in the present.



Stuck Exercise

This is the main technique of Social Presencing Theater. It is a process by which one experiences the essence of the U journey by moving from Sculpture 1 (current reality) to Sculpture 2 (emerging future).



4D Mapping

4D mapping makes visible the current reality in a social system, such as a school system, and reveals how embodied sensing and knowing can lead to fresh outcomes.





RUNNING LARGE GROUP PROCESSES

Shmulyian et al five 'I's

- having the right Individuals in the room
- aiming the method at resolving the right Issue
- having Intentional process (including pre-work, intra-method process, and follow-up)
- having the right Information in the meeting
- using the right Infrastructure (such as appropriate physical space, technology)

1. Paying attention to who is involved (get the 'whole system' in the room: authority, resources, expertise, information,

FutureSearch principles

2. Taking time to learn from each other - explore the whole before choosing where to act
3. Take a future focus and seek common ground (acknowledge, but don't 'work' differences and conflicts)
4. Self-management and responsibility for action

Griffin and Purser

A sense of the whole begins to emerge in large groups when participants:

- Experience a sense of interdependence and interconnectedness with others
- Engage in processes that brings a systems perspective to the events purpose
- Achieve visible results through highly participative and synergistic methods
- Feel a sense of appreciation and positive affect for self, others, and the organizational system
- Build community and trust through shared learning and experience
- Feel a sense of oneness that all are in this together regardless of position or level
- Feel a sense of greater hope for a better, more nurturing, and fulfilling future

Propositions:

1. Dialogue among stakeholders is necessary to transform collective thinking
2. Community building and relational practices foster interdependence and interconnectedness.
3. Collective learning increases a system's capacity to produce results that matter.
4. Diversity through shared inquiry promotes system vitality, synergy, resourcefulness, and growth.
5. Self-managing methods foster commitment and shared responsibility.
6. Whole systems perspective involves understanding how all factors (people, processes, sub-systems, and technology) within the system relate to each other and to the whole.

Core steps

Pre-event planning

- Identify who needs to be involved to represent the 'whole system.'
- Defining objectives: clarify the purpose and outcomes desired (e.g. visioning, strategy development, problem-solving).
- Logistics and preparation: organise venue, technology, and materials. For virtual large group processes, ensure robust online tools.

Designing the engagement process

- Choose methods that align with complexity and focus.
- Tailor to context.
- Build appropriate flexibility into the structure to allow emergent outcomes.

Facilitating the event

- Skilled facilitation is crucial to guide participants, manage dynamics, and ensure inclusive participation.
- Ensure usual considerations apply e.g. variety of sessions types to maintain energy and focus .

Post-event action planning – in advance

- Ensure expectations are set and appropriate mechanisms are in place
- E.g. ensure follow-up meetings to track progress and maintain momentum.

Sustaining change

- Build feedback loops into the process to monitor progress and adapt as needed.
- Share outcomes widely to reinforce stakeholder commitment.

Jack Martin Leith principles

For collaborative working

- The whole has greater wisdom than the sum of the parts
- Everything derives from purpose and outcomes
- Principles determine behaviour
- An honest assessment of current reality is a solid foundation on which to build the future
- Ownership and commitment emerge from an egalitarian approach
- People need to feel they are part of a community

For designing...

- The most effective design is one created by a design team
- Collaboration is a continuing process, not an event
- The people attending the gathering are active participants, not a passive audience
- People need time to connect and reflect
- Wisdom comes from an appreciation of the whole system
- Make decisions in real time, not off-line, and begin implementation immediately
- Engagement means engaging the whole person
- Effective gatherings require healthy conditions

...and facilitating

collaborative gatherings

- The facilitator is there to hold the space
- Facilitation requires a participant focus 'Work with what is happening rather than what you think should be happening'
- Less is more
'Never do anything yourself that could be done by participants. Ensure that power remains with the group and do not do rescue work.'
- There is strength in diversity
- Ask: 'Does anyone else feel like that?'

Five key tips and advice

Preparation

- Understand the system: identify key dynamics, tensions, or power imbalances.
- Tailor the Method: Choose or adapt the large group process approach to the specific context and goals (e.g., use Future Search for alignment, Open Space for emergent topics).
- Co-Design: Involve key stakeholders in planning the process to build trust and relevance.

2. Facilitation Techniques

- Encourage Equal Participation:
 - Use tools like Fishbowls or 1-2-4-All to ensure all voices are heard.
 - Actively draw out quieter participants and manage dominant personalities.
- Balance Structure and Flexibility:
 - Stick to a framework while allowing room for emergent dialogue and unexpected outcomes.
- Keep Energy Levels High:
 - Alternate between plenary and breakout sessions to avoid fatigue.
 - Use visual aids, generative scribing, or storytelling to maintain engagement.

3. Managing Group Dynamics

- Address Conflict Productively:
 - Use approaches like Deep Democracy to surface and integrate tensions.
 - Frame disagreements as opportunities for learning and growth.
- Foster Psychological Safety:
 - Set ground rules for respectful communication.
 - Encourage participants to speak honestly without fear of judgment.

4. Navigating Power and Diversity

- Be vigilant about power dynamics and ensure marginalised voices are heard (e.g., using Boundary Critique).
- Create an inclusive space by respecting cultural norms and different ways of knowing (e.g., through narrative practices).

5. Post-Event Support

- Provide a clear summary of outcomes, next steps, and responsibilities.
- Offer additional support to participants tasked with implementing actions.



CHALLENGES AND ETHICAL CONSIDERATIONS

Objections and weaknesses

- Hard work – has to be worth it
- Dependence on facilitators
- Leaders have to be ready and capable
- Are we really able and willing to deal with radically competing claims?
- Power play is possible
- Influence of personality (extrovert / introvert); some people are afraid to contribute in a large group
- Large group leads to decreased risk-taking, decreased ability to have a useful discussion and fear of standing out
- Under organising: each party strives for its own goals
- Favours educated and articulate people
- Collusive climate brings mediocrity: conflict avoidance, conformity
- Common ground projects are a list of 'the easiest things to do'
- Too much complexity -> group conflict – groupthink -> call for strong leaders -> autocratic not collaborative leadership -> groups suppress their internal differences
- The assumption of common ground legitimizes interests and aims of more powerful groups
- People fight, flee or freeze in the face of differences instead of keeping dialogue alive
- Sponsor and or facilitator manipulate the process of stakeholder selections to meet their(unconscious) needs/goals
- 'Talk-fests': Too much talking, not enough changing, it does not lead to action while it should
- Large groups can reduce risk-taking and critical discussions (e.g., groupthink, power play, or collusion).

Challenges

Over-reliance on facilitators

- Risk: process success may depend too heavily on skilled facilitation.
- Mitigation: train internal facilitators or build participant capacity for self-organisation (e.G., Through art of hosting).

Balancing structure and flexibility

- Risk: overly rigid methods can stifle creativity; excessive flexibility may lead to confusion.
- Mitigation: choose methods that balance structure (e.G., RTSC) with adaptability (e.G., Liberating structures).

Sustaining momentum

- Risk: lack of follow-up can lead to inertia or loss of engagement.
- Mitigation: develop clear action plans with accountability and feedback loops.

Power dynamics and marginalisation

- Risk: certain voices may dominate while others are excluded.
- Mitigation: use tools like boundary critique, deep democracy, and differentiation/integration to surface hidden power dynamics and include marginalised perspectives.

Groupthink or superficial consensus

- Risk: participants may prioritise agreement over critical thinking.
- Mitigation: encourage constructive conflict (e.G., Polarity management) and ensure minority views are considered.

An idealised or adaptive future?

Planning the change or making the change?

What world are you going back into?

Consideration for those not in the room?

Ethical considerations

Inclusivity and representation

- Ensure diverse voices are genuinely included, not tokenised.
- Avoid processes that favour the dominant group at the expense of marginalised perspectives.
- Methods like Boundary Critique ensure that marginalised voices are included, and tools like Polarity Management help balance competing priorities

Transparency

- Be clear about the goals, scope, and limits of the process.
- Avoid creating false expectations or overpromising outcomes.

Epistemic justice

- Value different ways of knowing (e.G., Lived experience, cultural knowledge).
- Avoid privileging 'expert' knowledge over community insights.

Respecting participant autonomy

- Avoid manipulating participants toward pre-determined outcomes.
- Enable genuine co-creation and shared decision-making.

Groups operate on three levels: explicit work tasks, emotional dynamics, and meta-awareness of group processes. Effective facilitation requires managing these concurrently to ensure both task completion and emotional cohesion.

Eight things to think about in systems | complexity | cybernetics

1. Not seeing the whole
2. Believing we know what the whole is
3. Assuming the whole that we see is real and concrete
4. Denying the realities of the parts
5. Assuming that seeing we are part of the whole creates a paradigm shift
6. Believing that we are speaking from a different paradigm
7. Denying the problems inherent in the whole
8. Ineffectual and counterproductive approaches as a result of the above

See my appendix 'what can systems thinking and change learn to become?' to Roar Bjonnes / Systems Change Alliance 'Understanding Systems To Change The World'

link.redquadrant.com/8systemsthinkingerrors



APPLICATIONS AND CASE STUDIES

Applications and case studies

Power+Systems Organization Workshop

- Social care directorate
- Housing Association
- Elite university

Encounters with the Other

- Local place-based systems working

Future Search

- Place-based organisational change

Other examples

1. Organisational Strategy Alignment

Method: Future Search

Context: A global NGO needed to align its strategy across 15 countries.

Outcome: Through participatory visioning, stakeholders co-created a 10-year roadmap.

Key Success Factor: Whole-system engagement ensured ownership and commitment.

2. Policy Formation

Method: Citizen Assemblies

Context: Ireland's Citizens' Assembly deliberated on same-sex marriage and abortion rights.

Outcome: Recommendations led to significant policy changes.

Key Success Factor: Structured deliberation ensured balanced, informed decisions.

3. Community Building

Method: World Café

Context: A post-disaster recovery effort engaged local residents in rebuilding their community.

Outcome: Participants identified key priorities and formed action teams to implement them.

Key Success Factor: Informal dialogue fostered trust and collaboration.

4. Process Improvement

Method: GE Work-Out

Context: General Electric used Work-Out to eliminate bureaucratic inefficiencies.

Outcome: Teams implemented actionable solutions within weeks.

Key Success Factor: Rapid prototyping and empowered decision-making.

5. Systemic Innovation

Method: Scenario Planning

Context: Shell Oil used Scenario Planning to anticipate energy transitions.

Outcome: Helped the company prepare for future market shifts.

Key Success Factor: Exploration of multiple scenarios allowed flexibility in strategy.

6. Cultural Transformation

Method: Appreciative Inquiry Summit

Context: A university engaged staff and students in shaping its future culture.

Outcome: Strengthened community ties and aligned on shared values.

Key Success Factor: Focus on strengths and positive storytelling.



From van der Zouwen (2011)

I'm not sure Peter Block would approve!

EVALUATING AND SUSTAINING CHANGE

Evaluating change

Outcome metrics

- Implementation of action plans: how many initiatives proposed during the large group process have been enacted to what degree?
- Achievement of objectives: were the large group process's stated goals (e.g., alignment, innovation, decision-making) met?
- Participant satisfaction: surveys or interviews to gauge the perceived value of the process (some time after the event)

Process metrics

- Stakeholder diversity: was the 'whole system in the room' adequately represented?
- Engagement levels: did participants actively contribute and feel heard?
- Quality of outputs: how actionable, innovative, or consensus-driven were the outcomes?
- Satisfaction (on the day)

Systemic Impact

- Long-term changes in behaviour, collaboration, or organisational culture.
- Improvements in systemic metrics (e.g., efficiency, equity, or resilience).

Sustaining change

Embedding accountability

- Assign clear roles, responsibilities, and deadlines for follow-up actions.
- Use project management tools to track progress on commitments.

Institutionalising learnings

- Build lessons from the large group process into organisational policies, systems, or workflows.
- Offer training or toolkits to help replicate the process in smaller teams.

Feedback loops

- Regular check-ins with participants to reflect on progress and challenges.
- Use iterative cycles of action and learning (e.g., through Action Inquiry).

Visible wins

- Celebrate quick wins to sustain momentum and demonstrate success.
- Share stories of impact through internal and external communication channels.

Nurturing networks

- Foster ongoing collaboration among participants through working groups, digital platforms, or follow-up events.
- Build a community of practice around the large group process outcomes

LGIs often over-focus on the event itself rather than embedding outcomes in a sustained programme of work. This creates risks of limited long-term impact.



FUTURE OF LARGE GROUP PROCESSES

Whither large group processes?

There are a million different versions of large group processes, with some genuinely interesting variants – yet, by and large, they 'more in the breach than the observance' these days, for a range of interesting reasons.

There is a major issue (which it's hard to avoid in training the topic!) with the emphasis on an event rather than a wider programme of work.

And a reinforcing loop with consultant-facilitators who are wedded to a particular method, seeing themselves as part of the Open Space community, or the Future Search community, or whatever. Further buttressed by 'community lead' gurus who absolutely work in this same way, and bring significant ideological stances to the situation.

Those ideological stances also contribute to the complexity and to the issues with large group processes. For example, I massively respect Weisbord and Janoff, who are behind Future Search - but they

bring a certain perspective about 'whole system in the room' and 'whole systems make improvements' (as per the pre-reading).

Whereas Merrelyn Emery (widow of Fred Emery, now leader of Open Systems Thinking) argues with that, saying that creating a flat democratic structure in a workshop then sending people back into a broken hierarchy isn't the silver bullet is a mistake - but that in fact you need to go further and the 'event' needs to become 'the organisation'.

Maybe one of the coffin nails for 'whole system in the room' work was hubris — we believed our own marketing

And large group methods can be sorted into two buckets: Open Space / Barcamp or people sitting at tables and working their way through a sequence of pre-designed activities.

In both cases, once the client organisation has experienced it, they think they can do it themselves.

My thoughts plus correspondence with Jack Martin Leith

Likely futures

Integration with technology

Digital large group processes:

- Virtual platforms like Zoom and Miro are enabling large-scale online gatherings.
- Tools for real-time polling, mapping, and decision-making enhance engagement.

AI and big data:

- AI can analyse patterns in participant input to uncover insights.
- Big data integration supports evidence-based discussions in areas like Citizen Assemblies.

Emphasis on Relational Systems Thinking

Warm Data Labs and similar approaches highlight the importance of relational understanding in tackling systemic complexity.

Large group processes are evolving to focus not just on outcomes but also on the quality of relationships and interdependencies.

Hybrid models

Combining structured and emergent methods to address complexity, e.g. Appreciative Future Search, Tech-Augmented World Café.

Focus on global challenges

Large group processes increasingly used to address cross-sectoral, global issues: climate crisis, social equity, resilience through e.g. scenarios, Assemblies, Warm Data Labs.

Expanding accessibility, democratising

Simplified frameworks (e.g., Liberating Structures) make large group process principles accessible. Cultural adaptation to diverse contexts.

Ethical Innovations

Ensuring equity, inclusivity, and epistemic justice remains a priority.

Methods are increasingly addressing systemic biases and fostering shared ownership of outcomes.



Take notes for your workbook

- Work in small groups to identify the most important three core themes you see in the large group processes described, and the most useful two differentiators between them.
- Identify five key criteria for *when* to consider using a large group intervention.

LEARNING ACTIVITY ONE

APPLICABILITY

Jack Martin Leith – when and when not

Broadly used to:

- plan and implement organisation change
- solve complex problems
- facilitate breakthrough thinking/innovation
- enable organisational learning
- revitalise organisation, create community

Likely to be essential when faced with:

- a lot of complexity and uncertainty
- very little clarity – the issue is unclearly defined, it's unclear what needs to be achieved, or the way forward is unclear
- a requirement to involve diverse groups with different agendas
- a need to produce breakthrough results quickly.

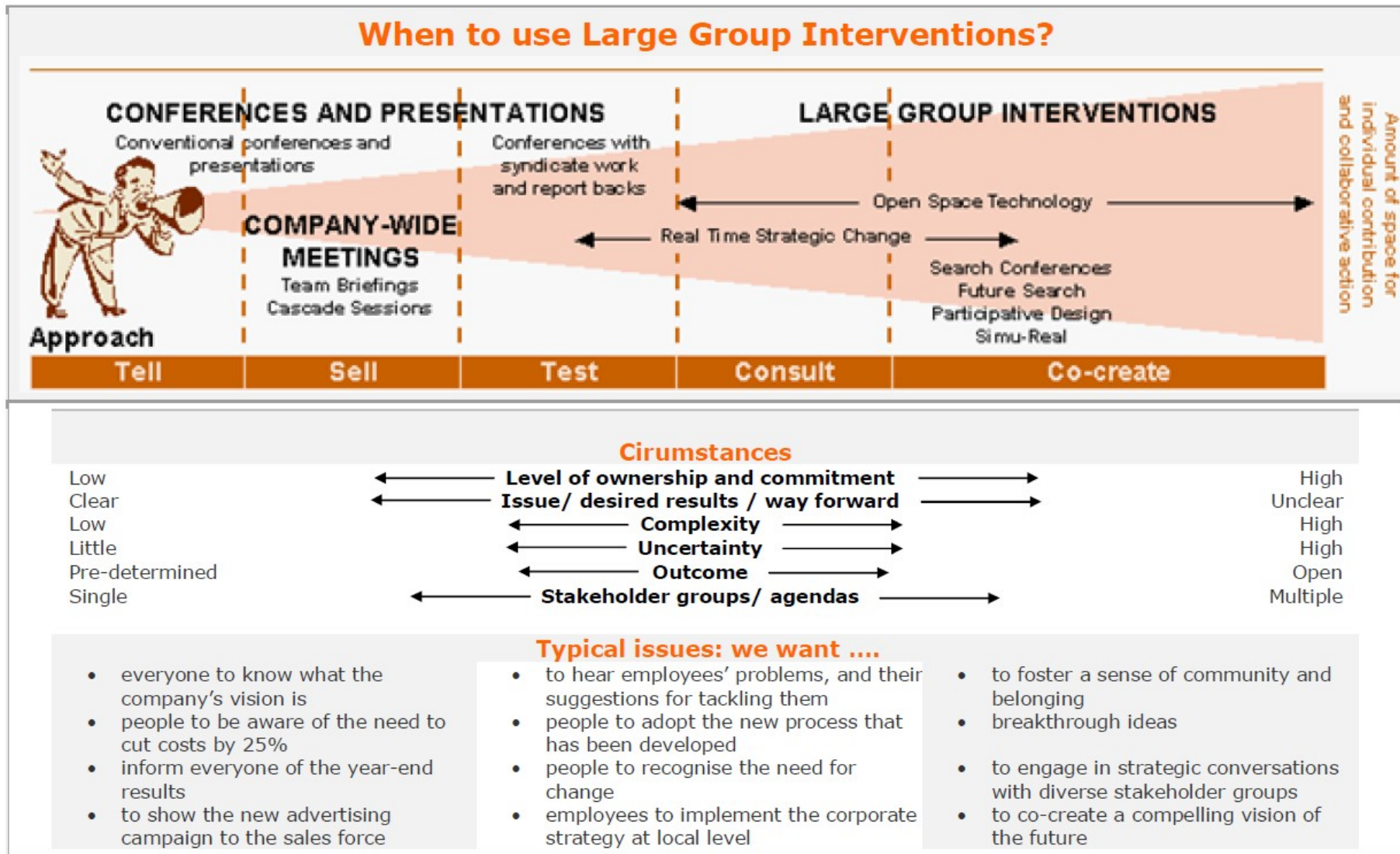
When not to use collaborative gatherings:

- as a one-off event with little or no attention to the follow-through process.
- as the latest 'flavour of the month'.
- excluding key stakeholder groups.
- with no design group, or design group blindly follows the recipe book instead of working with underlying principles.
- Ignoring the facilitation principles.
- a ploy to get buy-in through manipulation.

Without awareness it's a first step to liberating the organisation from a 'command and control' culture towards collaborative governance. Are you ready for this?

Jack Martin Leith and Paul Miller, 2004

from model by Bryan Smith in Fifth Discipline Fieldbook





Take notes for your workbook

Work in small groups, identify a 'top five' set of large group processes. Differentiate (and group if appropriate) them to guide you in how you you would use them in systems practice interventions.

LEARNING ACTIVITY TWO

GROUPING AND SELECTION



What attributes of large group processes have the possibility of raising concerns around safeguarding, radicalisation, British Values?

How can we avoid or mitigate these issues? How do they impinge on our practice?

SAFEGUARDING, RADICALISATION, PREVENT & BRITISH VALUES



KEY SOURCES AND TOOLKIT

Key sources and toolkit

- Weisbord (2005) – Techniques to Match our Values
- Weisbord – My Life on the Learning Curve
- Leith's Guide to Large Group Intervention Methods (2001)
- Leith (2023) Creating Collaborative Gatherings Using Large Group Interventions – Chapter 28 of the Gower Handbook of Training and Development, Third Edition, 1999: Twenty-four years down the track
- van der Zouwen (2011) Building an evidence based practical guide to Large Scale Interventions: Towards sustainable organisational change with the Owhole system.
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Relevant documents at link.redquadrant.com/largegroupprocesses

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Relevant documents at link.redquadrant.com/largegroupprocesses

Always happy to talk...

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Large group processes

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Facilitation and workshop design

BRIEF REVIEW OF
PREVIOUS MODULES

1

INTRODUCTION TO
LARGE GROUP PROCESSES

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Large group processes draw on a rich tapestry of theories, including systems thinking, group dynamics, social constructionism, and action research, to foster large-scale change.
These foundations ensure large group processes are participatory, systemic, and adaptive, addressing the complexity of modern challenges.

CORE THEORETICAL FOUNDATIONS

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The principles of large group processes are interconnected and mutually reinforcing, forming a robust foundation for enabling large-scale collaboration, systemic alignment, and adaptive change.
They aim to ensure scalability, reduce fragmentation, and responsiveness to complexity.

KEY PRINCIPLES OF
LARGE GROUP PROCESSES

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CLASSIFICATION AND ENUMERATION
OF LARGE GROUP PROCESSES

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CLASSIFICATION OF
LARGE GROUP PROCESSES

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MAIN FEATURED APPROACHES

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OTHER INTERESTING APPROACHES

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RUNNING LARGE GROUP
PROCESSES

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CHALLENGES AND ETHICAL
CONSIDERATIONS

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APPLICATIONS AND CASE STUDIES

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From van der Zeeuw (2012):
I'm not sure Peter Block would approve!

EVALUATING AND
SUSTAINING CHANGE

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FUTURE OF LARGE GROUP
PROCESSES

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Take notes for your workbook:
- Work in small groups to identify the most important three case studies you use in the large group processes described, and the most useful two differentiators between them.
- Identify five key criteria for when to consider using a large group intervention.

LEARNING ACTIVITY ONE
APPLICABILITY

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Take notes for your workbook:
Work in small groups. Identify a 'top five' set of large group processes. Differentiate (and group if appropriate) them to guide you in how you would use them in systems practice interventions.

LEARNING ACTIVITY TWO
GROUPING AND SELECTION

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What attitudes of large group processes have the possibility of raising concerns around safeguarding, radicalisation, British Values?
How can we avoid or mitigate these issues? How do they impinge on our practice?

SAFEGUARDING, RADICALISATION,
PREVENT & BRITISH VALUES

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KEY SOURCES AND TOOLKIT

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