

5.3 Large Group Intervention

I. What is large group intervention?

“Large group interventions are methods for involving the whole system, a critical mass of people who are affected by change, both inside the organization (employees and management) and outside it (suppliers, partners and customers).” Bunker and Alban (1997:xvi)

II. Get them together to do what?

- To understand the need for change
- To analyze the current reality and decide what needs to change
- To generate ideas about how to change existing conditions
- To work out how best to implement and support the change to ensure it will work.

III. Why do we need to use such large-scale methods?

- **VALID DATA:** OD believes that data exist in all organization strata, wisdom does not reside only among those in the top of the hierarchy; wisdom and valid data exist among those who would be affected by the change issues. It is a firm OD belief that people who are closest to the problem or change issue being discussed often have critical information that enriches the change strategy. However, because they are also often at the lower levels of the organization, a traditional small group or top down change strategy may not solicit their input. Missing their perspective will hamper the validity of the change plan.
- **SUCCESSFUL IMPLEMENTATION:** The OD approach to change is always to work from the “end game” up. Successful implementation (end game) of any change requires sufficient ownership among those key groups/individuals upon whom the successful implementation is critically dependent. So from the beginning, these individuals/groups need to be invited to participate in understanding the logic for change, the change direction, and how to embark the change (as indicated in the 4 key activities exist in any whole system methodologies).
- **SPEED IN IMPLEMENTATION:** Speed is a crucial factor, especially during the implementation period. When everyone who needs to support the implementation is involved in the decision-making process, carrying it out happens faster and with less resistance. When everyone gets on board with the change through these large group methods, less time is needed for implementation, and the implementation is

more likely to be successful. One major advantage of these change methods is that it is not necessary to tell, resell, and finally beat the change into everyone. This type of methodology honors *ownership, commitment, alignment, and speed*.

- **SYNERGY THROUGH DIVERSITY:** OD believes the diversity that comprises the whole system often creates a synergy that leads to more innovative change – a more creative solution – than a small group can possibly produce.

IV. Conditions that require whole system methodologies:

- **WHEN THE CHANGE ISSUES ARE SYSTEMIC:** For large group interventions to be effective, the issues addressed must be systemic; that is, they must affect a large number of people across all lines and levels of an organization.
- **LIMITED MARGIN FOR ERROR:** There are very limited margins for failure for the change – therefore getting it right is critical given the climate in which the change takes place.

V. Nine common reasons for why large-scale change fails:

- Focusing on events as the sole mechanism of large-scale change – without appropriate before and after event processes to achieve significant sustainable change.
- Getting everyone together in one room and calling it effective large-scale change – without proper planning, proper process of engagement and clear deliverables.
- Keeping the existing deep hierarchy - long lasting, dramatic change will be difficult if during the change we do not begin to address the steep hierarchy that slows down decision making, turf protection and the persistence of an “entitlement” mind-set.
- Having a singular focus (hard or soft) on a method or set of methods used - nonsustainability will ensue if only a “hard focus” (e.g. Six Sigma, or implementing quality tools) or a “soft focus” (e.g. Dialogue) is pursued without combining them in various situations to achieve results.
- Implementing non systemic change - just focusing on one area of a problematic organization, e.g. customer feedback, without considering multiple fronts, e.g. processes, culture, HR practices, etc will produce sub-optimal results.
- Avoiding vs courting conflict – without actively surfacing conflicting viewpoints for discussion will often help to build up internal resentment, in turn making people feel stifled, fearful of the outcome of the change.

- Summarily silencing dissenters – Ideas from outcast dissenters that may work in the future when discarded will often not allow powerful grassroots leaders to emerge to begin pioneer work.
- Confusing alignment with agreement – If everyone on a team or large group believes they must agree 100% on an issue before moving on, the pace of change and resultant improvements will be agonizingly slow.
- Failing to consider the power of internal collective experience brought to bear in planning and problem solving sessions – when outside experts are brought in who take over the involvement of informed internal people would result in unnecessary delays, sapping of organizational initiative, and excessive reliance on outside resources.

VI. What does sustainable change look like?

How do we know a sustainable change occurring? From research, there is a checklist of characteristics we can use to assess if a change is sustainable. This checklist can be used in planning the change effort, in evaluating it midstream or analyzing what worked and what did not in a post-project, lessons to be learned session.

Four categories:

1. Direction
2. Energy
3. Distributed Leadership
4. Appropriate mobilization of resources

1. DIRECTION:

Definition:

Direction is the general path forward, with appropriate boundaries that guide what actions people can and can't take.

EVIDENCE OF DIRECTION includes:

- *Belief that the change effort has legitimacy*
- *Cross-functional/cross-group/multi-stakeholder interests are acknowledged and addressed for the good of the whole moving forward in a common direction*
- *Not tightly clinging to a previously designed and implemented solution*

2. ENERGY:

Definition:

Energy is the drive that people have to advance the change initiative. It manifests itself in such ways as people organizing themselves to do continuous improvement,

staying/working late, and collaborating across functional boundaries, even though it has no direct benefit to them.

EVIDENCE OF ENERGY includes:

- *Gut level as well as head level engagement*
- *Good ideas come from anywhere*
- *People experience genuine opportunities for new, big things to happen*
- *People have some key personal concerns satisfied*
- *Appreciation of others' uniqueness as manifested by authenticity and respect toward others*
- *There is a thirst for learning*

3. Distributed Leadership

Definition:

Distributed leadership happens when a) people at all levels, in all locations, are authorized to own their own problems and solutions, b) when people at all levels in all locations have the information, skills, and the reward systems to support the new desired goals.

EVIDENCE OF DISTRIBUTED LEADERSHIP includes:

- *Genuine internal commitment to advancing the change*
- *Better results and changed behaviours*
- *Upward pushback and mutual accountability*
- *The group is not wholly dependent on the top leader for vision or solutions.*

4. Appropriate Mobilization of Resources

Definition:

When resources – time, people, money, and technology – are mobilized and deployed to places they most benefit the organization or community,

EVIDENCE OF APPROPRIATE MOBILIZATION OF RESOURCES includes:

- *The change draws on resources at a rate that matches the availability of resources to support the change.*
- *When an external or internal consultant leaves, things do not backslide.*
- *People are anxious to move forward based on common ground.*
- *Distributed leadership actions and local initiative taking*
- *Communication of important facts, issues, and beliefs.*

VII. Example of large-scale, whole system methodologies

The following three categories are the pioneer methods as identified by Bunker and Alban in 1998.

The Methods: Creating the Future Together

1. The Search Conference
2. Future Search
3. Real Time Strategic Change
4. ICA Strategic Planning Process

The Methods: Work Design

5. The Conference Model®
6. Fast Cycle Full Participation Work Design
7. Real Time Work Design
8. Participative Design

The Methods: Whole-System Participative Work

9. Simu-Real
10. Work-Out
11. Open Space Technology

The following 61 methods were identified by Holman, Devane and Cady in 2007.

1. Appreciative Inquiry: A Positive Revolution in Change – David L. Cooperrider and Diana Whitney
2. Collaborative Loops – Dick Axelrod and Emily Axelrod
3. Dialogue and Deliberation – Sandy Heierbacher
4. Integrated Clarity: Energising how we talk and what we talk about in organizations – Marie Miyashiro and Marshall Rosenberg
5. Open Space Technology – Harrison Owen
6. The Technology of Participation – Marilyn Oyler and Gordon Harper
7. Whole-Scale Change – Sylvia L. James and Paul Tolchinsky
8. The World Café – Juanita Brown, Ken Homer, and David Isaacs
9. Ancient Wisdom Council – WindEagle and RainbowHawk Kinney-Linton

10. Appreciative Inquiry Summit – James D. Ludema and Frank J. Barrett
11. The Conference Model – Dick Axelrod and Emily Axelrod
12. Consensus Decision Making – Tree Bressen
13. Conversation Café – Vicki Robin
14. Dynamic Facilitation – Jim Rough and DeAnna Martin
15. The Genuine Contact Program – Birgitt Williams
16. Human Systems Dynamics – Glenda H. Eoyang
17. Leadership Dojo – Richard Strozzi-Heckler
18. Evolutions of Open Systems Theory – Merrelyn Emery and Donald de Guerre
19. OpenSpace-Online Real-Time Methodology – Gabriela Ender
20. Organization Workshop – Barry Oshry and Tom Devane
21. PeerSpirit Circling: Creating Change in the Spirit of Cooperation – Sarah MacDougall and Christina Baldwin
22. Power of Imagination Studio: A Further Development of the Future Workshop Concept – Petra Eickhoff and Stephen G. Geffers
23. Real-Time Strategic Change – Robert 'Jake' Jacobs
24. SimuReal: Action Learning in Hyperdrive – Catherine Perne and Alan Klein
25. Study Circles – Martha L. McCoy
26. Think like a Genius: Realising Human Potential through the Purposeful Play of Metaphorming – Todd Siler
27. Web Lab's Small Group Dialogues on the Internet Commons – Steven N. Pysert, J.D., and Marc N. Weiss
28. Dynamic Planning and the Power of Charrettes – Bill Lennertz
29. Future Search: Common Ground under Complex Conditions – Marvin Weisbord and Sandra Janoff
30. Scenario Thinking – Chris Ertel, Katherine Fulton and Diana Searce
31. Search Conference – Merrelyn Emery and Tom Devane
32. Community Summits – Gilbert Steil, Jr and Michele Gibbons-Carr
33. Large Group Scenario Planning - Gilbert Steil, Jr and Michele Gibbons-Carr
34. SOAR: A new Approach to Strategic Planning – Jackie Stavros, David Cooperrider and Dr Lynn Kelley
35. Strategic Forum – Chris Soderquist

36. Strategic Visioning: Bringing Insight to Action – David Sibbet
37. The 21st Century Town Meeting: Engaging Citizens in Governance – Carolyn J. Lukensmeyer and Wendy Jacobson
38. Community Weaving – Cheryl Honey
39. Participative Design Workshop – Merrelyn Emery and Tom Devane
40. Collaborative Work Systems Design – Jeremy Tekell, Jon Turner, Cheryl Harris, Michael Beyerlin and Sarah Bodner
41. The Whole Systems Approach: Using the Entire System to Change and Run the Business – William A. Adams and Cynthia A. Adams
42. Rapid Results – Patrice Murphy, Celia Kirwan and Ronald Ashkenas
43. The Six Sigma Approach to Improvement and Organisational Change – Ronald D. Snee, Ph.D
44. Action Learning – Marcia Hyatt, Ginny Belden-Charles and Mary Stacey
45. Action Review Cycle and the After Action Review Meeting – Charles Parry, Mark Pires and Heidi Sparkes Guber
46. Balanced Scorecard – John Antos
47. Civic Engagement: Restoring Community through Empowering Conversations – Margaret Casarez
48. The Cycle of Resolution: Conversational Competence for Sustainable Collaboration – Stewart Levine
49. Employee Engagement Process – Marie McCormick
50. Gemeininn-Werkstatt: Project Framework for Community Spirit – Wolfgang Faenderl
51. Idealized Design – Jason Magidson
52. The Practice of Empowerment: Changing Behavior and Developing Talent in Organisations – David Gershon
53. Values into Action – Susan Dupre, Ray Gordezky, Helen Spector and Christine Valenza
54. WorkOut – Ron Ashkenas and Patrice Murphy
55. Online Environments that Support Change – Nancy White and Gabriel Shirley
56. Playback Theatre – Sarah Halley and Jonathan Fox
57. Visual Recording and Graphic Facilitation: Helping People see what they mean – Nancy Marguiles and David Sibbet

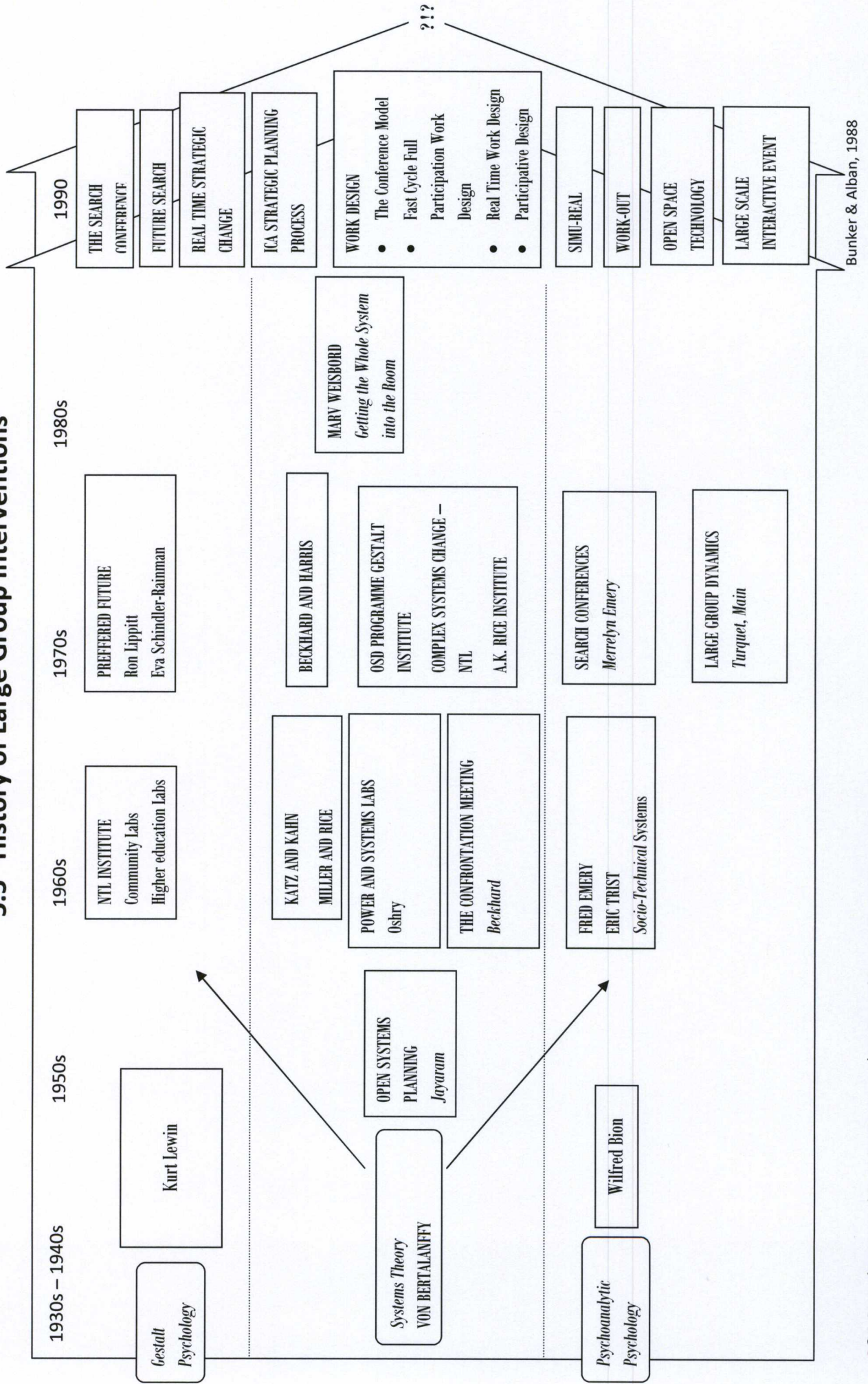
- 58. The Drum Café: Building Wholeness, One Beat at a Time – Warren Lieberman
- 59. JazzLab: The music of Synergy – Brian Tate
- 60. The Learning Map Approach – James Haudan and Christy Contardi Stone
- 61. Visual Explorer – Charles J. Palus and David Magellan Horth

5.4 Organisation development strategies for system-wide change

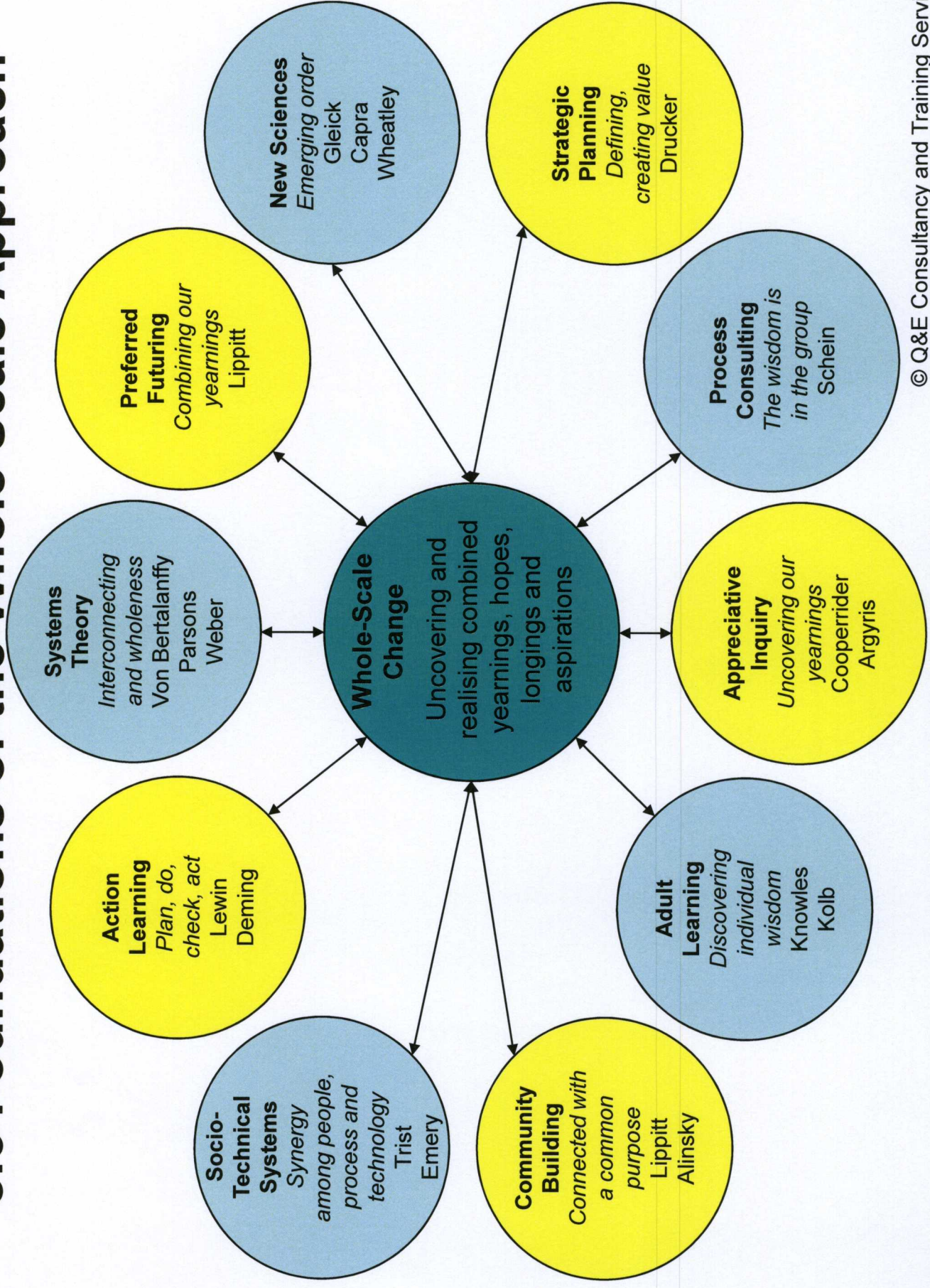
| | Traditional data collection and feedback methods | Whole-system interactive events |
|--|---|---|
| Theory base | Action research | Open systems theory |
| Purpose | Improved organisational effectiveness | Alignment around a strategic direction, work redesign, system-wide issues |
| Data base | | |
| • Source | • Internal to organisation | • Organisation and external stakeholders |
| • Availability | • Limited to units | • Widely shared |
| Responsibility and accountability | Driven by senior management | Broadly shared by senior management with whole system |
| Time | Slow: Waterfall process by level | Fast: Rapid response to data |
| Learning about | Individual or unit functioning | The organisation as a system |
| Consultant role | Central to: <ul style="list-style-type: none"> • Data collection • Data interpretation • Data feedback process | Structures and facilitates: <ul style="list-style-type: none"> • Data collection • Data analysis • Action taking |
| Change potential | Sequential incremental change | Simultaneous fundamental change |

Bunker & Alban, 1998

5.5 History of Large Group Interventions



5.6 Foundations of the Whole Scale Approach



SECTION 5.7

SO WHAT IS AN OD PLAN?

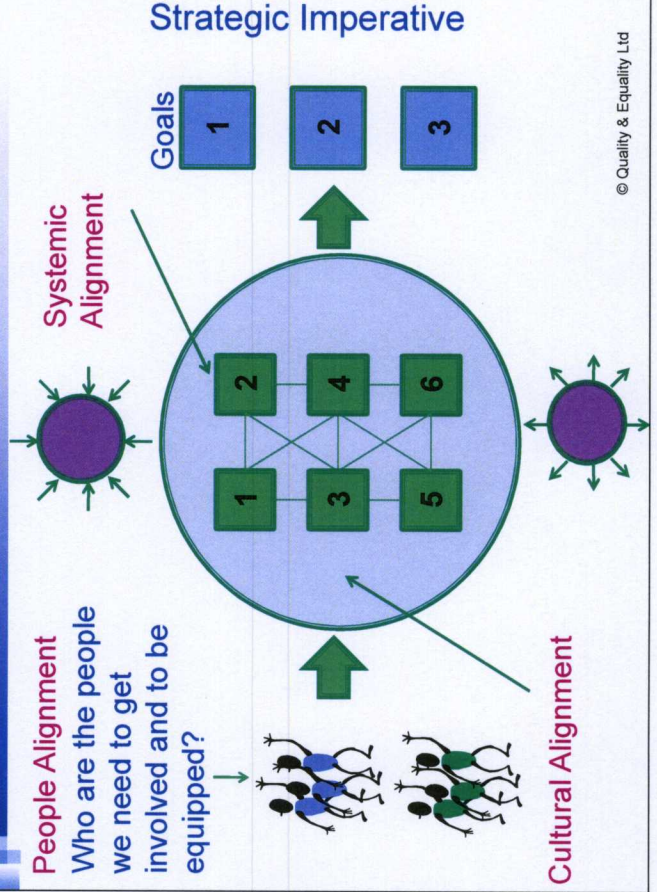
Definition

- An OD Plan is an internal integration plan that specifies which internal variables need to be adjusted and adapted so they will work together to ensure the organisation's strategic ambition will be realised. It is a people centric plan.

It has **specific areas** outlined, with **sequence of work, time line**, marked clearly by **who** will do **what** by **when** and **how**.

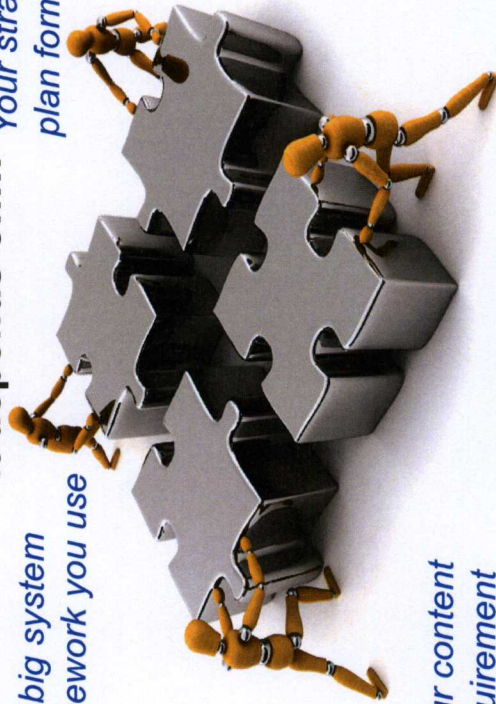
Link between strategy and OD plan

- ❑ The top leaders need to be educated to always ask for the twin pack – strategic plan with corresponding OD plan, not just the strategic plan.
- ❑ Strategic planning process should be a collaborative, inclusive, participatory process (involved key middle managers).
- ❑ Those who are involved in forming the strategic plan will also be part of the group who will help to formulate the OD plan.
- ❑ Strategists and OD people stay as strategic partners throughout the process.



What does an OD plan look like?

The big system framework you use **It depends on...** *Your strategic plan format*



Your content requirement (systemic alignment) **What categories will appeal and make sense to your leaders**

An example NHS guide to develop an OD plan

- Initial planning phase – develop project plan

After the project plan has been developed, there are six phases of the organisational development planning process:

- Phase 1 – Identify current areas for improvement
- Phase 2 – Prioritise areas for improvement
- Phase 3 – Identify and group underlying capability gaps
- Phase 4 – Develop options to address each capability gap
- Phase 5 – Agree the best solutions
- Phase 6 – develop detailed OD actions plans

The OD plan should be developed with full involvement of the PCT executive and non-executive team. When complete, it will need to be agreed by the entire PCT Board.

An example

You can use the following categories:

- 1 Organisation Design issues
- 2 System and Processes issues
- 3 People Capacity and Capability issues
- 4 HR policies issues
- 5 Performance Management issues
- 6 Operation Protocol issues
- 7 Cultural (mindset & behaviour) issues

A Draft OD Mapping Plan

| Strategic Area | Org Design Issues | Systems & Process | People (capacity & capability) | Performance Mgt | HR Role | Operation Protocol | Cultural (mindset & behaviour) issues |
|----------------|-------------------|-------------------|--------------------------------|-----------------|---------|--------------------|---------------------------------------|
| 1 | | | | | | | |
| 2 | | | | | | | |
| 3 | | | | | | | |
| 4 | | | | | | | |
| 5 | | | | | | | |
| 6 | | | | | | | |

Suggested processes

- The strategic planning exercise itself has to be a “distributed leadership” exercise.
- Follow with an initial OD assessment exercise – map out the scale and scope of internal change as required by the strategic implementation.
- Strategists and OD practitioners then work together to adjust both plans – the strategic plan and OD plan (involve as many key people as possible).
- Submit both plans to the top team for signing off.
- Feed back the plan to the management population and involve them to map out the implementation steps of both plan, allocate roles, and other support.....etc.