Large Group Interventions for Whole System Participation, Development and Change

by Mary Simon Leuci

Communities today face a tremendous amount of change and find they also must deal with the rapidity of change. Those who survive and thrive will be communities who can create a sense of common order for themselves in what appears to be chaos, allowing the chaos itself to create opportunity. This will likely require thinking and engaging citizens and organizations differently than in the past in order to mobilize for action. This includes at least the ability to involve the breadth and depth of the community, analyze the community situation, and determine and implement courses of action. In short, we may have to expand our skills and capacities to engage whole community systems.

A whole new arena of large group or whole system processes are emerging in the practices of organizational and community development that can assist communities in organizing themselves for purposeful action. What are these processes and what distinguishes them from typical group processes? Which specific processes are most typically being used in with communities and how are they different? What are the key principles to whole system processes? Where can we learn more about how to use these processes? These are the questions to be addressed in this introduction and overview of whole system processes for community change.

What are whole system processes for change?

Whole system processes for organizational and community change, or large group interventions¹ (the term often used in organizational development), are methods for involving the whole system, internal and external, in the change process. Key to these processes is the deliberate involvement of a critical mass of people affected by the change—both internal and external to the system.

Such systems-based change-oriented methods allow for active and authentic participation in:

- understanding the need for change,
- analyzing the current reality and deciding what needs to change,
- generating ideas about how to change the existing ways things are done, and
- implementing and supporting change and making it work.

¹ The definition, purpose, and features are based on similar discussions in Large Group Interventions by Barbara Bunker and Billie Alban.
Some of the most commonly recognized whole system methods from organizational development include the Search Conference, Future Search, the Conference Model, Simu-Real, Participative Design, Real Time Strategic Change, Open Space Technology, and Work-Out. Of these, the Search Conference, Future Search and Open Space have had increasing community applications. The Institute of Cultural Affairs Strategic Planning Process represents another which has had many community applications across the world. These are not the only means used to engage communities in a systems approach to change. A number of processes have emerged in the field of community development that embody and amplify the characteristics and principles of whole systems or large group interventions for change. Variations of these and others are exploding as community and organizational change facilitators adapt and create ways to involve people for an increasingly diverse array of communities and organizations.

Why use methods for whole group participation

One of the primary reasons for using systems-based whole group approaches in community development is that doing things from the top down just doesn’t work satisfactorily any more. Top-down change takes a lot of time and energy if it works. People react with distrust, cynicism and resistance. Often they truly know that proposed changes won’t work and they understand why, but they weren’t given an appropriate and meaningful opportunity to share in the development of direction, designs, strategies, policies, and implementation. Communities and organizations can no longer afford the time it takes to filter things down, enforce change from the top, engage one sector at a time, and deal with all of the resistance.

Engaging the larger community—those affected by what’s happening—builds commitment and capacity for change from the top down and the bottom up. It ultimately takes less time and is more efficient. Often we hear the myth that engaging and involving people from the get-go is too time-consuming. Comparative studies are showing that traditional top-down processes take longer to get the same point of systemic and real change.

These approaches which use active participation and involvement of citizens (those at the lower level of the organization) provide greater and quicker access to information. The people who comprise the greater part of any community or organization are the ones who often have the critical information necessary to creating action for change. In addition, the diversity found in the whole system creates a synergy when the factions come together as a community.

Distinguishing Features

The role of the consultant, the community developer, or facilitator is markedly different than the traditionally central role of the expert who gathers the data, analyzes and interprets it, and provides data feedback processes for the organization or community. In whole systems change processes, the expert has been replaced by one who provides skilled assistance in structuring and facilitating the collection of data, its analy-
sis, and the taking of action. The facilitator fully recognizes these are developmental processes that involve collaborative learning—learning shared by the facilitator and the participants.

The following table helps identify some of the significant differences in approaches.

<table>
<thead>
<tr>
<th>Development for Whole Systems Change</th>
<th>Traditional Development Change Strategies</th>
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<tbody>
<tr>
<td>based on open systems theory and bringing the whole system together to plan with people</td>
<td>fragmented approaches and planning for people</td>
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<td>committed to meaningful participation and engagement of the whole</td>
<td>token approval or engagement for selective participation</td>
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<tr>
<td>learning about the community as a system—a focus on interconnections and relationships</td>
<td>learning focusing on individuals, sectors, or isolated parts</td>
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<tr>
<td>focus on change efforts involving the future or strategic direction, work or organizational redesign (anticipatory learning)</td>
<td>focus on improving the effectiveness of the current organization (maintenance learning)</td>
</tr>
<tr>
<td>generation of useful and necessary information and data from internal and external stakeholders and sources; relying and valuing the information that community citizens know</td>
<td>focus only on internal sources for organizational development. Communities sometimes focus only on external sources or internal sources to the exclusion of the other.</td>
</tr>
<tr>
<td>purposeful wide sharing of the information and data generated with the whole community</td>
<td>sharing information only with those that leadership perceive need to know</td>
</tr>
<tr>
<td>broadly shared accountability and responsibility of those in leadership with the whole system</td>
<td>responsibility and authority lie with the leadership</td>
</tr>
<tr>
<td>learning as a community</td>
<td>training or teaching in whatever is deemed necessary by the leaders or the experts</td>
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<tr>
<td>potential for simultaneous basic change</td>
<td>sequenced or compartmentalized step-by-step changes</td>
</tr>
<tr>
<td>based on premise that resources and capacities exist upon which to build the future</td>
<td>based on the fixing or repairing problems and deficiencies</td>
</tr>
</tbody>
</table>

This table is drawn from the Community Development Academy’s participant manual Building Communities from the Grassroots (1996-1998) developed by Jerry Wade, Donald Littrell, and Mary Simon Leuci, University of Missouri-Columbia and Barbara Junker and Billie A. Iban’s book Large Group Interventions: Getting the Whole System to the Room (1997) published by Berrett-Koehler, San Francisco.
## A quick comparison of several specific approaches

<table>
<thead>
<tr>
<th>Specific Approach</th>
<th>Outcomes, Key Traits</th>
<th>Arena of Use</th>
<th>Capacity</th>
<th>Length of Workshop</th>
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| Future Search           | • Creating shared future vision and designing collaborative actions.  
                          | • Appropriate to building collaborative work, engaging wide range of stakeholders, issue-focused planning, and building future direction. | Public arena, business arena, community | • 40-80, but can design to run simultaneous groups of 40-80  
                          |                                     |                                        | • Typically engages representatives of entire system.                                                                                     | 3 days             |
| Real Time Strategic Change | • Best when leadership already has a strategy in mind and wants to engage others to improve it, flush it out and to gain support.  
                           | • Allows flexibility for leadership to determine how much it will share decision-making responsibility.  
                           | • Appropriate for creating direction, issue analysis, new organizational design, problem solving, coordination of intergroup activities. | Public and business arenas; non-profit organizations | • 100 to 2,400 participants on site. Requires great attention to creating a logistics structure to such highly participatory events.  
                           |                                     |                                        | • Engages entire system, not just representatives.  
                           |                                     |                                        | • Can be used with larger groups run simultaneously.                                                                                     | 2-3 days           |
| Open Space Technology   | • Ideal for exploration of issues and finding out what people really care about.  
                          | • Key outcomes: development of ownership and system-wide understanding.  
                          | • Can be coupled with development of goals and vision. | Public and business arenas; community | • 50-250  
<pre><code>                      |                                   |                                        | • Can be used with larger groups run simultaneously.                                                                                     | Typically 3 days   |
                      |                                                                                     |                                        | • Appropriate for engagement of representatives or entire system.                                                                      |                    |
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| Community Futures and Revised Take Charge | • Citizen-based futures-oriented action planning process resulting in common purpose, vision and planning direction.  
• Key outcomes: development of short-term plans, long-term direction, ownership and commitment. | Organizations, public arena, community | • 30-100  
• Can be used with larger groups run simultaneously.  
• Typically engages representatives but can | Flexible and adaptable; can be used in 5 hours, series of workshops or intense 2 days include entire system. |
| Conference Model                       | • Work redesign of a whole system  
• Hallmark is use of “walk-through” for those who did not physically participate in a conference to share information and build commitment. | Public sector and business | • Engages people in series of 3-5 multi-day conferences, typically 40-100 each.  
• Engages representatives in each conference. | Each conference varies but typically lasts 2-3 days. |

Many participative community processes allow opportunity for integration of whole system approaches. Several of note include the Tennessee Valley Authority’s Quality Communities Process, the Rocky Mountain Institute’s Economic Renewal Program, the Public Issues Forums supported by the Kettering Foundation, and Study Circles. For more information about those listed above and other whole system resources, see the resource list.
Words of wisdom from practice and experience

- Take the time to learn about these processes and internalize the principles and values. Don’t assume that because you are trained in group process, community development or organizational development that you know what these are, that you are already doing it, nor that they might be easy to jump into. Large group dynamics (40 plus) are different than small group dynamics. There is both an art and a science to interweaving small group processes as a means of diffusing group affect and maintaining integrity of individual input.

- Don’t wait until you have read every last book and article or watched everyone else facilitate a process. Volunteer to work with someone who has the experience as a way to learn. Watch how they often pull from the best of several approaches to tailor a process that fits the situation and group.

- Focus on purpose. It sets and determines what to include and exclude. It is the starting point in planning who to involve, kind of discussions to have, kind of decisions to make and processes to use.

- Team up. Those most experienced acknowledge that more goes into the orchestrating of a large group process than any one person can reasonably handle. Remember, watching the group and handling the behind the scenes stuff is a critical part of overall facilitation, too.

- Learn from every experience. Purposefully debrief with your team member(s) and with the planning group. Ask what could have been done better or differently. Be honest with each other. Adapt and integrate, combine and experiment as you learn and practice.

- Use self-managed small discussion groups of 3-8 people to decrease dependency on authority, encourage real participation as peers, build capacity and encourage ownership. This means it is not necessary to assign facilitators to each small group but provide roaming facilitators to answer questions and provide guidance as needed.

- Be absolutely clear and honest with the groups and communities. Be clear about your expectations and what you can deliver, potential outcomes, work needed on their part, time, etc.

- Do it right because it’s the right thing to do. If you don’t have commitment from leadership (not necessarily always elected officials in community settings) to value and implement what is generated by the large group process, don’t promise results. Effectiveness requires this to be a truly different approach. It is more than token involvement or creation of buy-in for pre-determined solutions. If the planning group or leadership wants to short change the upfront planning time needed for significant involvement and participation, it’s also a waste of time and just another short-term fix.

- Design for good conversations (I recommend small groups of 3-6 to maximize participation) and allow time for reflection and creative breakthroughs.

- Be sure to honor the past and present while creating the future. But always design to build on common ground.
• Pay attention to logistic details as they do affect results. The larger the group the greater the need for lots of planning and detail management to ensure things run smoothly and that people really have valid participation.
• Expect the unexpected because nothing ever goes as planned.
• Expect success. Belief in the possible is contagious.

Meaningful long-term results require a process from the initial stages through implementation to support and manage change. The methods we use are extremely critical.

The purposeful engagement of a systems approach within the community toward creating community change is a radical departure from traditional planning for the community. People’s meaningful involvement and participation and their commitment to change are products that indeed represent change.

Remember why we are working with communities and organizations in this way. We want to facilitate their learning, discovery, analysis, planning and action taking. We want to facilitate their building of commitment among themselves for long-term and sustainable change. We want communities to succeed in changing and learning how to change.

Printed Resources


North Central Regional Rural Development Center (to be published in 2000). Take Charge: Participatory Action Planning For Communities And Organizations.


Resource Videos

Chattanooga: A Community with a Vision (documents a participatory systems process that has engaged and mobilized a whole city). Available from Eleanor Cooper, 110 Windmere Drive, Chattanooga, TN 37411, phone: 423-624-1215

Other Resources
Community Futures information available from Jerry Wade or Mary Simon Leuci, 225 Gentry Hall, University of Missouri, Columbia, MO 65211, Phone: 573-882-8393, FAX: 573-882-5127. Also training in the action planning process and introduction to large group change processes provided as part of the Community Development Academy, 1-800-545-2604, e-mail: Mudirect@missouri.edu, web: http://www.ssu.missouri.edu/comndev/cda/default.htm
Information regarding the Conference Model (approach to work design that includes use of Future Search and series of follow up conferences to design work and action plans) available from the Axelrod Group, 723 Laurel Avenue, Wilmette, IL 60091, Phone: 847-251-7361, e-mail: axelgrp@mc.com, web: http://www.tmn.com/axelrodgroup/
Institute of Cultural Affairs: International, rue Amedee Lynen 8, B-1210 Brussels, BELGIUM. (32) (0)2 219 00 87, fax (32) (0)2 219 04 06, e-mail: icai@linkline.be, web: http://www.icaworld.org/
Issues Forums information and resources available from Kettering Foundation, 100 Commons Rd., Dayton, OH 45459-2777, Phone: 1-800-433-7834, web: http://www.kettering.org/
Open Space Institute, 15347 SE 49th Place, Bellevue, WA 98006, Phone: (425) 643-6357, FAX: (425) 865-8168, e-mail: osi@tmn.com, web: http://www.tmn.com/openspace/
SearchNet, 4333 Kelly Drive, Philadelphia, PA 19129, ph: 215-951-0300, fax: 215-951-0313 (Membership organization that provides training and publishes newsletter regarding Future Search practices. Members pay fee and provide pro bono work.)
For information about Future Search, Search, Real Time Strategic Change, see http://www.ctarrce.org/futuresearch.htm
Information on the conduct of study circles can be obtained from Study Circles Resource Center, 697 Pomfret Street, P.O. Box 203, Pomfret, CT 06258, 860-928-2616, fax: 860-928-3713, e-mail: scrc@neca.com