

Challenging Organisations and Society

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Involving Stakeholders to Develop Change Capacity for More Effective Collaboration and Continuous Change

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MARVIN WEISBORD . SANDRA JANOFF¹

Ten Principles for Making Meetings Matter

“Considering how much time and resources we all spend in meetings, it should shock us that we don’t get more important work done. Since it is in meetings that society confronts and resolves the many problems and issues it faces, we should pay more attention to their shape and conduct. Because, if transformation does not take place in meetings, can we expect transformation to happen in society? Indeed, the very format of the type of meeting we are in determines how much progress and success we can produce.”

Rolf Carriere, formerly UNICEF Regional Director, Indonesia

The meeting, as Rolf Carriere highlights in his comment, is the central building block for all change – social, technological and economic. It is a key forum where face-to-face dialogue is possible, enabling people to clarify their differences and discover common ground. Indeed, we believe we can only change society constructively one meeting at a time. If your goal is making positive ripples in the world, you have no better option than to run the best meetings you are capable of.

We along with colleagues worldwide have confirmed that hypothesis repeatedly during the last 20 years of managing meetings in diverse cultures. Our learning laboratory—we call it “Future Search”—is a strategic planning for meetings used equally well in communities, NGO’s and business firms. Indeed, people everywhere have used this format to explore society’s most challenging issues. Moreover,

¹ Marvin Weisbord and Sandra Janoff co-direct Future Search Network, an international non-profit offering collaborative planning services in any language, any culture for whatever people can afford. They are co-authors of Future Search: Getting the Whole System in the Room for Vision, Commitment and Action, 3rd edition, (Berrett-Koehler, 2010). They have trained more than 3,500 people in using their principles.

they nearly always discover and act on common ground. They do things after these meetings that many considered impossible beforehand.

- Toronto, Canada, for example, made a strategic plan for the future of its 300,000-pupil school system.
- IKEA, the world's largest home-furnishings company, redesigned its global supply chain, and also created an environmental sustainability plan with the recycling of all products as its ultimate goal.
- The U.S. Federal Aviation Administration got agreement from airspace users for unprecedented, contentious changes to managing air traffic.
- Derry-Londonderry, a city divided by the Irish "troubles," formed collaborations among former antagonists to commit to the city's renewal.
- The Indonesian Ministry of Education, backed by UNICEF, implemented a plan for decentralizing school systems.
- Lawrenceville, NJ citizens formed an ongoing cooperative, Sustainable Lawrence, that is reducing the city's carbon footprint and helping other communities to do likewise.
- UNICEF in the Southern Sudan organized the release of thousands of child soldiers from involuntary servitude.
- Departments of Correction in Massachusetts, Nebraska, and Washington State, made strategic plans to quickly improve key aspects of public safety and prison systems.

We documented all of the above in the 3rd edition of *Future Search* (Weisbord & Janoff, 2010).

Over many years we derived key principles that we can apply for any purpose in any culture. We use them to structure meetings for success, managing our own behavior while allowing others to manage theirs. Our underlying theory base can be traced back to the discovery of "group dynamics," a term first used by the late Kurt Lewin, Ronald Lippitt and Ralph White (1939) in their pioneer studies of authoritarian and democratic leadership. We built on their theories and practice, along with the work of Eva Schindler-

Rainman, Eric Trist, Fred Emery, John and Joyce Weir, and Yvonne Agazarian. All this is documented in our books and articles (e.g. Weisbord, 2012; Weisbord & Janoff, 2007. Weisbord cites more than 300 sources that chart the progress of social and management scientists toward creating a work world that includes “dignity, meaning and community” alongside technological and economic values.)

There have been many doctoral and master’s theses studying Future Search and its underlying principles (Weisbord & Janoff, 2010b). The most useful of these, a PhD dissertation by Elaine Granata was uniquely based on a comparative study of multiple conferences, thus offers insights for success that can be generalized. From a study of nine conferences she developed a systematic model of effectiveness, noting these predictable outcomes when the core principles and design requirements were observed:

- The meeting sponsor’s objectives were met;
 - People exhibited high affect and energy that continued after the conference;
 - Common ground became the impetus for change;
 - People engaged in dialogue that led to mutual understanding.
- Granata identified two criteria central to an effective conference, without which success is unlikely:

Getting the right people (“whole system”) in the room and agreeing to work only on issues for which there is common ground.

These findings confirm our first and fourth principles. However, the meetings she describes were run in accordance with all of them.

“Polarization,” she reported, “decreased as predicted by theory when people discover they can be united by some common ground. That does not mean that differences are gone; in fact they are not. They are isolated, recognized, acknowledged and put aside so that work on common ground can take place.” (p. 5) The risk is that people will agree only at a high level of abstraction, and end up doing relatively minor, non-controversial projects. Thus a caveat before you consider our principles: techniques do not care how they are used. The user’s intention and attention to basics make all the difference.

The evidence for the efficacy of these methods strikes us as overwhelming. The age-old question that remains is why they are not more widely practiced. That, alas, is akin to asking why so many people, given the evidence, do not eat healthy food, exercise, and act out the Golden Rule. As a species we have the capability to perform for good or ill. Below we sketch out some things we can do in society to be at our best.

Six Principles for Managing Structure

Principle 1 – Get the Whole System in the Room

The surest way to shift a system's capability for constructive action is the right mix of people in the room. Success starts with the invitation list. The framework we use is to have people who among them have–

- Authority to act
- Resources of time, money, connections, etc.
- Expertise uniquely theirs
- Information others can use
- Need, e.g. customers, clients, those affected by outcomes

If you take the first letter of each category above, the acronym spells ARE IN. (We did not plan this. A colleague pointed it out!) Such a mix makes it probable that people will act. They cannot avoid responsibility if they don't. The act of convening such a group can be change of a high order. It makes things possible that have never happened before. Ronald Lippitt and Eva Schindler-Rainman (1980) in their study of 88 community meetings demonstrated this principle conclusively. This principle is also broadly supported by the differentiation-integration organizational studies of Paul Lawrence and Jay Lorsch (1967).

Principle 2 – Control What You Can, Let Go of What You Can't

Having the right people is a necessary but not sufficient condition for success. We also seek to optimize output by managing a meeting's boundaries – its purpose, time frames, meeting room, food break, breakout groups, and the clarity of our own and others' responsibilities. How well we do all of this determines to a large part

how participants will behave. That way we free ourselves from trying to figure out what's wrong with people and how to fix them. So we –

- Clarify the purpose first. Is it a) information, b) discussion, c) decision, d) action, or e) some or all of the above? Only the meeting's sponsors can answer this.
- Know our role. Do we have a stake in the content? Are we responsible for the process? Are we doing both?
- Start and end on time. We don't punish prompt people by waiting for latecomers or extending the meeting.
- Choose healthy working conditions – Rooms with daylight make a difference in what groups do. So do healthy snacks, and spaces accessible to anyone. We won't work in windowless rooms. They drain energy in ways nobody realizes.
- Match the time to the goals. Time is our scarcest resource. We make sure we have enough for the task. We ask group members at the start to help by accepting responsibility for doing the best they can in the time available. We seek to avoid the “not enough time trap”. If there's not enough time, we shouldn't be there.

Principle 3 – Explore the Whole Elephant

“Whole elephant” refers to a Sufi fable in which a group of blind men set out to discover the nature of an elephant. Each encounters one part—the trunk, tusks, side, legs, tail, etc. and each thinks the whole beast is a larger version of the part he touches. The same is true for meetings that matter. Every person knows something nobody else knows. They don't always know that they know it. Our objective is for everybody to learn more about the whole situation than any one person knew at the start. We use techniques that help people hear each other's experience before they act. The idea is to get everybody talking about the *same* world, one that includes all perceptions. This principle derives from Eric Trist's and Fred Emery's groundbreaking report (1960) on the strategic merger of two aircraft engine companies. They found that having people dialogue on the larger world they share reduced dysfunctional fight/flight behavior. They also learned the dilemmas of trying to be both an ex-

pert and an impartial facilitator in the same meeting—and recommended against the practice.

Our Favorite Procedures

- A “Go-Around” – Asking each person (who wishes) to say something in turn about the topic at hand.
- Time lines – Long sheets of paper on the wall divided into eras, enabling everyone to contribute to a history of the whole.
- Mind maps – Having each person contribute to a large diagram of all the issues they relate to a central topic. Tony Buzan (1991) devised this method, and we have described it in detail in our books (Weisbord and Janoff, 2007, 2010).
- Flowcharts – Drawing up on the wall—with input from the whole group—the sequential process involved in making a product, organizing a fund-raising campaign, or delivering a service.

In our meetings we consider it essential that no matter which technique we use, everybody should hear everybody else.

Principle 4 – Let People Be Responsible

Our philosophy is to work with people the way they are, not as we wish them to be. So we don’t diagnose their behavior, nor seek to remedy their defects. Every diagnosis calls for an intervention. There are more diagnoses of human frailty than stars in the sky. Best to stick to the task and see who is willing to work. We have given up diagnoses such as “hidden agendas”, “resistance” and “defensiveness”. Instead, we keep opportunities open. If people choose not to play, that’s their right. John Weir’s (1971) chapter on how he and his wife invented a unique personal growth laboratory cites the numerous influences that led to this philosophical principle. It may also be an example of Newtonian physics in society. Every act of force calls for an equal and opposite reaction.

Some Things We Do

- Keep purpose and time frames front and center.
- Encourage groups to manage themselves. We suggest (but do not require) that when they are in breakout groups people choose a discussion leader, recorder, reporter and timekeeper. This makes “self-organizing” easy.
- Stay with uncertainty until people decide what they will do. We neither shut down nor prolong discussions. Instead, if the meeting lags, we ask what people want to do.
- Accept all statements as legitimate, whether we consider them relevant or not.
- When in doubt about what to do next, ask the group.

What We Don't Do

- Teach personal or group skills (unless those are meeting goals).
- Tell people what we consider ok to bring up.
- Reconcile disagreements.
- Reinterpret peoples' comments.
- Challenge peoples' motives or assumptions.
- Ask people what they are hiding.
- Summarize, categorize or analyze what is going on.
- Ask for positive OR negative examples to balance those given.

If a group member tells us privately about something he does NOT want to be said, we ask, “What would you like to do?”

Principle 5 – Find Common Ground

We call “common ground” those matters on which people all agree without reservation. We have been in meetings where 80% of the time goes to 20% of the issues that are difficult or impossible to resolve. We don't ignore problems and conflicts. We treat them as information rather than action items. Sometimes it takes only a few minutes of dialogue to turn apparent disagreements into action. If people choose to hash out an issue they cannot resolve, we point out the time dilemma. This principle also derives from Lippitt's and

Schindler-Rainman's studies. They found that groups, which focus exclusively on problem solving become depressed. When people imagine "images of potential" their positive energy flows.

Why We Seek Common Ground

- People are more inclined to accept responsibility and support one another.
- Action will be swifter on issues with shared agreement.
- Ambiguity and uncertainty are greatly reduced by full agreement.
- It is easier to make a "not agreed" list than to pressure for reluctant compromise.

What We Do With "Not Agreed" Items

- People may take these items up after the meeting if they wish.
- We state the obvious: Lack of common ground does not exempt leaders with formal authority from making decisions, but they are more aware of the work that has to be done to get others on board.

Principle 6 – Master the Art of Subgrouping

We use a little-known structural method that keeps groups working and open to new ideas when they might want to fight or flee. It is called "functional subgrouping" (Agazarian, 1997), the practice of inviting people to ally with others based on similar experiences, feelings, or points of view. We do it simply by asking a "who else" question. Groups will keep working so long as no member becomes isolated. Otherwise they may polarize and get stuck. For every statement made in a meeting there is a subgroup—those who agree, disagree, or don't care. Subgroups matter only when somebody makes a risky statement that might take people away from the task.

If a person says, for example, "I'm frustrated because this is all nonsense," we don't say, "Who else thinks what's being said is nonsense?" Rather we seek to get the person joined emotionally. "Is any-

one else here frustrated for any reason?” Our goal is to make frustration legitimate regardless of content. Sometimes two polarized subgroups emerge, each with a strong point of view. In those cases, we invite one subgroup’s members to talk to *each other* while the other group listens. Then they switch roles. When both groups have spoken, we ask what conclusions people have come to. Usually they note a diversity of views within each group, *and* some common ground between them.

How We Use Subgroups

- Wait for a spectrum of views to be expressed.
- Assure a functional subgroup for any sticky statement by finding others with the same underlying feeling. “Who else feels that way?” (NOT, “Who has a different point of view?”)
- Listen for an integrating statement from a person who realizes that A and B both have points worth hearing. This signals that a group can move on.

When We Become Active

- When the group has lost sight of the task.
- When people make unfounded assumptions, e.g. “I think everybody here feels ...” Or “I’m probably the only one who feels this way, but...” We *always* check out such statements by asking others to say where they are.
- When someone needs an ally. This is rare, but important. We may see who else shares a feeling only a few times in a three-day meeting, when emotions are high. That’s enough to keep people working on the task.

Four Principles for Managing Our Own Behavior

Principle 7 – Make Friends with Anxiety

Groups tend to treat anxiety as the facilitator’s responsibility. We have learned to see anxiety as “blocked excitement” (Perls, Hefferline, Goodman, 1994). We have learned to turn anxiety into creative

energy by practicing our own tolerance for disorder, ambiguity and tension. The best strategy when a meeting falls into confusion is to just wait. See if you can wait 10 to 20 seconds more than usual after you feel the impulse to act. It may seem like a lifetime. We are often surprised at what happens when we don't jump in. Nearly always someone in the group knows what is needed to move forward.

Ways We Manage Anxiety

- Just stand there and ... breathe!!
- Check our negative predictions. We make ourselves anxious in the present when we imagine a negative future that hasn't happened.
- Get used to silence. Pause, pause and pause again before we speak.
- Get people moving. It's a great anxiety reducer.
- State the obvious. Say what we see, not what we interpret.
- Consult the group. Somebody always knows what to do.

Principle 8 – Get Used to Projections

“Projection” means attributing our own thoughts, motivations, traits, and feelings to someone else. We judge others by our own reactions to them, even though it is we who do the perceiving, feeling, interpreting and acting. In this system of thought, others become projection screens for what originates in us. Each person in a meeting reflects back to us some aspect of ourselves. There is a vast literature on projection. When we put that word into Google, it offered up several options. To eliminate references to movies, we chose “projection as a defense mechanism” and got 277,000 results in 23 seconds. Among the more practical systems for managing projections is Claes Janssen's (2005) *Four Rooms of Change*.

The most useful way to manage a meeting's dynamics is to accept the projections we make on others as parts of us. The more parts of us that we know, whether loved or hated, the greater the variety of human beings we can work with. This is a key step in “not taking things personally”. If a person in a meeting “pushes our buttons,”

that's a sign we have contacted a part of us we don't know very well. The best thing we can do is ... nothing—except to experience the feeling and let the action run awhile.

We Use Meetings For Our Own Growth By ...

- Keeping aware that *we* produce our own judgments, fears and fantasies.
- Hearing others' statements of "fact", "truth" and "reality" as *their* projections.
- Seeking not to take others' statements personally (easier said than done, but well worth working on).

Principle 9 – Be a Dependable Authority

Like it or not, every leader draws projections. If we lead a group, if we pick up a marker and go up to the easel, we assume the authority role. Any move we make to take charge may lead someone to make us an unconscious stand-in for a parent, teacher, boss, sibling or any other person they once idealized or loathed. Oddly enough, positive projections, while infinitely more pleasing, also have a down side. We may fall into the trap of believing our main role is to make everybody like us. We might become puppets on our own string. This too is the subject of a vast psychological literature. (However, if you google "authority projections," you also will get a lot of city planning data from local authorities in Great Britain.)

Some Ways We Manage Authority Projections

- Staying alert to the many ways we stimulate authority projections, e.g. giving orders, judging comments, cutting people off, rushing to finish, changing a schedule, even making a suggestion. It's always big risk to try to change course without consulting the meeting.
- Practicing being dependable, e.g. providing information people don't have, starting and ending on time, reiterating overall goals, assuring all views are heard and staying out of the way when people are working.

- Staying aware that every judgment we make is a part of us. We try not to take the bait if somebody challenges us.

Pitfalls We Avoid

- Pretending we have no authority.
- Doing for people what they can do for themselves.
- Treating every suggestion as a problem we should solve.
- Acting on our natural tendency to control uncertainty, minimize conflict, and keep everybody happy.
- Acting out our wishes to be loved, appreciated and all wise.

Principle 10 – Learn to Say No if You Want Your Yes to Mean Something

There is a saying that the definition of insanity is doing what you've always done while expecting different results. When we are faced with requests to get transformational outcomes under dubious conditions, we practice saying "no" as nicely as possible. When possible we offer an option likely to achieve the goal while removing the barrier.

Six Reasons to Say "No"

1. Logistical. The deadline is too tight and resources can't be found in time.
2. Existential. The request exceeds the design limits of human capability.
3. Pragmatic. We are asked to do what everybody knows is impossible.
4. Self-Protective. We won't accept responsibility without authority.
5. Value Conflict. The objective contradicts a deeply held value of ours (e.g. helping manipulate a group to accept an unpopular decision already made).
6. Realistic. We are convinced that the person asking for our help has imposed conditions almost sure to set up a failure, e.g. "faster, shorter and cheaper" than whatever time frames and costs we proposed.

Saying “No” with Alternatives

1. We point out that we don't like to fail either, so need a framework likely to succeed.
2. We tune into the person's objectives – “What outcome do you expect by the end of the meeting?”
3. Offer options we can deliver. “In our experience, that requires a day. We can't do it in two hours.”

As we seek to manage by the principles described here, we feel healthier, more in charge of ourselves and in a better position to make a difference in society. These practices apply equally to large meetings addressing big social issues and everyday meetings during which the world's work gets done. You can make a positive difference any time you set it up so people can do things together that none can do alone.

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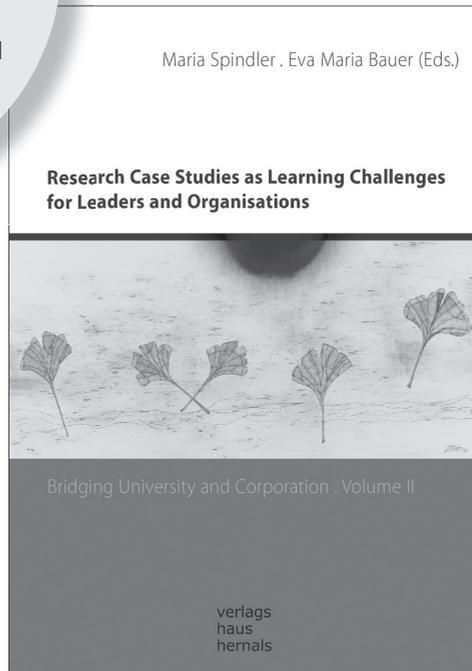
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