Organization Development Primer:
Theory and Practice of Large Group Interventions

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With organizations and their environments in a state of constant flux, organizational development researchers have been challenged to develop methodologies that enable fast yet comprehensive change. In response, a wide range of large-group change techniques has emerged, including future search, open space, simu-real, and search conference.

Building on the foundational notion that organizations are best understood as whole systems, large group intervention technologies are designed to connect stakeholders of a system around a series of meaningful and progressive conversations. The goal is to create a common appreciation of "why" change is necessary and determine what has to be done to move forward. Proponents suggest that the methodologies produce better outcomes and build widespread understanding and commitment among the very people who need to implement the solutions.

While the techniques vary in their focus, involvement parameters, degree of structure, and time frames, they are all bound by a set of assumptions that collectively promote whole systems thinking and the development of socially constructed preferred futures. Below, I explore the common assumptions and assess why large group techniques produce significant results.

ASSUMPTIONS UNDERPINNING LARGE GROUP TECHNIQUES

Central to all large group change techniques is the assumption that organizations are "whole systems." Rather than segmenting the organization into differentiated and disconnected parts, all large group change methods view the organization as a series of inter-connected parts, with each part a manifestation of the whole.

Many approaches begin with an examination of the environment to ascertain the organization's responsiveness to the external drivers of change. Given the external and internal drivers of future success, the agenda is often directed to producing frame-breaking change throughout all levels and functions in the organization. By living the process itself, stakeholders develop expanded mental models and new relationships

and skills for collaboration, all factors that promote ongoing organizational learning. Some approaches, such as search conference, focus specifically on designing organizations for wide engagement and continuous learning.

Viewing organizations as whole systems requires members to identify the relationships among the many parts (people, units, departments) and the relationships between the organization and its external environment. Large group techniques facilitate a deep appreciation for these relationships and interdependencies. While action research methodologies of the 1950s through the 1970s also permitted whole systems thinking, most work was facilitated through a top management team on behalf of, rather than alongside, the whole system. The dominant wisdom of the day was that large groups were unmanageable and that top mangers had the required perspective to accurately define challenges and prescribe solutions. It was also assumed that decisions could be passed over the fence to operational managers, who would have the energy and necessary understanding to implement them.

Large group technologies, on the other hand, permit large numbers of stakeholders to be actively engaged in the collection and analysis of data, as well as in decision making and planning. Richard Beckhard was the first to experiment with engaging the whole system in problem solving. Beckhard's confrontation meeting brought together large groups of managers for the purpose of collecting and sharing information, setting priorities, planning actions, and following up. He identified a number of benefits: better and faster decision making based on accurate, real-time data and increased commitment to organizational goals. Residual benefits included enhanced capacity for decision making, communication, and collaboration between units.

Also foundational to large group change techniques is the assumption that organizational reality is a function of the collective perceptions of its members. Accordingly, organizations evolve as they articulate, test, and refine the mental models of their members. Large scale approaches enable new learning by expanding the database from which stakeholders diagnose "what is" and then define "what can be". This wide-angle view provides a platform from which a preferred future can be collectively envisioned and enacted.

Appreciating that it can be unsettling for people to examine and adjust their mental models, large group techniques employ future visioning as a safe and non-threatening way for participants to explore competing assumptions. Working with large groups (up to 300) in the 1970s, Ronald Lippet discovered that a group's vitality, creativity, and commitment are enhanced when its focus is goal oriented rather than problem focused. Lippet noted that groups focused on a preferred future not only created more innovative and robust solutions but were also more energized and committed to achieving them. For Lippet, the key was to involve all system stakeholders, not just the organizational elite. From this insight, preferred futuring has become a critical element of many large-group techniques.

Finally, all large scale methods share in common the assumption that people, when the conditions are favourable, can be driven by a common set of core values, such as Maslow's basic human needs for love, sense of belonging, and respect. Accordingly, the role of the facilitator is to create the psychological and physical space for people to come together, out of their own volition, to connect in service of a common organizational cause. The role of the facilitator is not one of creating goals and energy for change but of discovering or unleashing it. Simply put, when people are empowered to solve pressing organizational challenges, they will do so responsively and the common ground they seek will be rooted in universal human needs and values.

WHY DO LARGE GROUP TECHNIQUES WORK?

Kathleen Dannemmiller's "arthritic organization" is an apt metaphor to explain why large group techniques are effective. An arthritic organization is one in which functional units cease to communicate or connect, due largely to the specialization of tasks and the development of horizontal fiefdoms. As domains become tightly defined, rigidity sets in and the system is no longer able to adapt its processes or relationships in response to changing environmental conditions.

With procedural, emotional, and structural blockages at each joint, the arthritic organization prevents people from communicating. As mishaps occur between units who need to collaborate but don't, feelings of depersonalization and paranoia escalate, ultimately resulting in greater mistrust and polarization of goals and values.

Large group techniques, on the other hand, appear to be an antidote to organizational arthritis. First they bring the stakeholders of a system together in a common and public setting and with boundaries for respectful interaction and skilled facilitation. Structure and boundaries create both a physical and psychologically safe space for people to voice their opinions, be heard, and hear others. Moving between small and large group forums, people have an opportunity to connect with each other, note differences and similarities, and develop a real appreciation and empathy for each others' interests. As people join in and connect with each other, the stage is set for learning. People develop new, expanded mental models that provide a platform for the creation of common ideals.

Large group techniques provide an alternative structure - from a slow moving arthritic one hobbled by conflict to an adaptable, collaborative environment in which members share and agree on data, define joint interests, and build relationships; activities Dannemiller suggests lead to the creation of healthy, aligned organizations with "one heart, one brain." An antidote to the arthritic organization syndrome, large group technology creates porous, easy to penetrate boundaries among people and units of all levels to enable deep and pervasive action.

SUMMARY

In his video Productive Workplaces, Marvin Weisbord suggests that in its heyday, factory managers adopted the techniques of scientific management, but left out the values associated with worker respect, union-management cooperation, and employee development. "They took the words," Weisbord claims, "but forgot the music." As a result, scientific management became associated with piecemeal pay and management–worker strife. It is a familiar story, and over the years we have seen techniques such as workplace engineering and the learning organization hastily employed, minus the rich theoretical underpinning that gives the techniques their real force and meaning.

As we have seen, large group techniques are based on a sound set of assumptions including whole systems thinking, stakeholder involvement, and the idea that organizations are socially constructed. It is the assumptions, paired with the techniques, that give large group methodologies their zing. As long as the assumptions are

honoured, practitioners can select from a wide array of large group techniques to achieve their ultimate aims.

Moving beyond specific interventions, researchers and practitioners are recognizing that large groups - whole leadership communities or "communities of practice" are examples - can become instrumental for ongoing organizational work, thus moving large groups beyond the domain of an episodic change technique to a key organizing feature. This bridge between large group change theory and organization design for continuous learning also provides new avenues for research. For example, how might we build workplace communities or even entire organizations around the principles of whole systems thinking? Once built, how can they be sustained?

In any event, with numerous success stories to their credit, from creating and implementing breakthrough strategies to designing adaptable organizations, large-group techniques are here to stay.

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