Creating Collaborative Gatherings Using Large Group Interventions

by Jack Martin Leith

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In retrospect, the title should have been Creating Collaborative Gatherings Using Large Group Intervention *Methods.*

The world has moved on considerably since the book was published in 1999 and so has my thinking. However, much of what follows remains relevant in 2026.

I hope you will find it useful.

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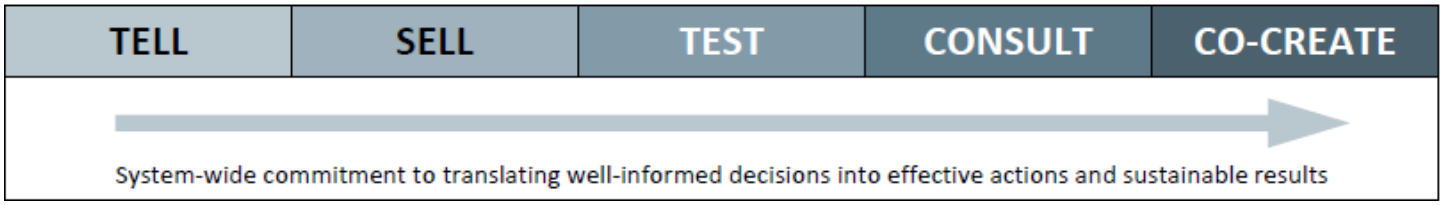
A complex world calls for strategic collaboration

They say we've moved into the information age. But that's not completely accurate. What we're witnessing is not just an explosion of information. We're seeing the proliferation of just about everything.

No matter whether it's street cultures or nation states, drugs or spiritual practices, providers or consumers, TV channels or distribution channels, pluralism is now the norm. It's becoming increasingly difficult to find a way through all of this proliferation, diversity and complexity using the inflexible, machine-like model of organisation that we inherited from the industrial revolutionaries. We badly need an organisational model that's considerably more adaptable and responsive.

This chapter is about a new approach to organisation called strategic collaboration. Strategic collaboration is a way of getting significant work done when faced with a lot of complexity, diversity and uncertainty, and very little clarity. It enables widely differing groups of people to work together on issues of mutual concern and strategic importance. A large part of the chapter is devoted to the design and facilitation of collaborative gatherings, because these are such a vital part of the overall approach.

From conventional conferences to collaborative gatherings



(Ref. 1)

Conventional 'tell and sell' in-house conferences (see diagram) have limited value in the new world. They may generate short-term buy-in but they are incapable of generating the high levels of ownership and commitment that are necessary for sustained success. Today's complex environment calls for new ways for people to congregate in large numbers and do real work together. It calls for collaborative gatherings.

When to use collaborative gatherings

Broadly speaking, collaborative gatherings are convened to:

- plan and implement organisation-wide change;
- solve complex problems;
- facilitate breakthrough thinking and innovation;
- enable organisational learning;
- revitalise the organisation and create community.

Convening a collaborative gathering is likely to be an essential first step when the issue confronting you displays:

- 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

If you use collaborative gatherings in any of the following situations, success – if any – is likely to be short-lived.

- You treat the gathering as a one-off event and pay little or no attention to the follow-through process.
- You introduce collaborative gatherings as the latest 'flavour of the month' panacea.
- You exclude key stakeholder groups.
- There is no design group, or the design group blindly follows the recipe book instead of working with the underlying principles.
- You ignore the facilitation principles.
- You use the gathering as a ploy to get buy-in through subtle manipulation.

Most importantly, you need to be fully aware that you're taking the first step towards liberating the organisation from a 'command and control' culture and nudging it towards a collaborative form of governance. If your organisation is not ready for this, all plans involving collaborative gatherings should be abandoned.

Large group interventions: power tools for creating collaborative gatherings

A wide range of methods exists for creating collaborative gatherings. These are sometimes referred to as large group intervention (LGI) methods, although this is a misleading term because the group does not have to be large – it simply needs to be composed of the right people. Although there are more than 20 different LGI methods, this chapter will focus on five of them: Future Search, Open Space Technology, Participative Design, Real Time Strategic Change and Simu-Real. Other popular methods include The Conference Model®, Search Conferences and Work-Out.

Users of large group intervention methods

Here are just a few of the organisations that have used LGI methods to create collaborative gatherings: 3M, Boeing, Boots the Chemists, Dutch Railways, Ford Motor Company, Guinness (now Diageo), KPMG, Local Government Staff Commission for Northern Ireland, Marriott Hotels, Microsoft, Prudential Assurance, Severn NHS Trust, Shell, SmithKline Beecham (now GlaxoSmithKline) and United Distillers and Vintners (now Diageo). Case studies have been published in many different books and journals. The author may be contacted for additional information. (Ref 2)

The seven main large group intervention methods

Methods for creating an agreed vision and strategy (Ref 3)

Future Search

Primary purpose: creating an agreed vision and strategy.
Developers: Marvin Weisbord and Sandra Janoff.

Length: two to three days (including two nights). Group size: ideally 64 people.

The central concept of Future Search is 'getting the whole system in the room' to find new ways forward by working through the five stages:

Stage 1 Review the past from several different perspectives.

Stage 2 Map the present.

Stage 3 Create a range of future scenarios.

Stage 4 Identify the common ground.

Stage 5 Develop action plans.

A Future Search conference is planned by a steering committee of volunteers and managed by two facilitators. Work is done at round tables in mixed groups of eight. Extensive use is made of large sheets of paper taped to the wall. The past is reviewed through three 'timeline' charts – one for personal milestones, another for important organisational or community developments, and a third for global events. Participants then create one large mind map of current reality, and say what they are proud and sorry about regarding the current situation. Each small group generates a vision of the future, which it presents in a creative way to the other groups. Common ground is then identified. The action planning that completes the Future Search is normally done in functional or self-selecting groups. Post-event implementation work is self-managed.

Real Time Strategic Change

Primary purpose: designing and implementing sustainable organisation-wide change.

Developers: Kathie Dannemiller and Robert Jacobs.

Length: two to three days.

Group size: limited only by capacity of venue.

Real Time Strategic Change (RTSC) is more than a large group intervention method: it is a principle-based approach to transforming the whole organisation. The principles are a condensed version of those described in the latter part of this chapter and so they will not be repeated here.

RTSC begins with contracting and scoping. This is followed by a leadership alignment event, which enables the formal and informal leaders of the organisation to understand the RTSC philosophy, agree purpose and outcomes for the change effort and make a commitment to moving forward together.

Next comes an organisational alignment event in which the whole organisation, or a substantial part of it, takes part. The design team, composed of members of the different sub-systems that will be participating in the event, defines the purpose and outcomes, and develops a sequence of activities that will enable participants to realise them. There is no fixed conceptual framework governing the sequence of activities, although Kathie Dannemiller's change formula, D x V x F > R, is sometimes used. This states that the product of D (dissatisfaction with current state of affairs), V (a vision of how things could be) and F (first

steps towards realising that vision) must be greater than R (resistance to change). The participants sit at round tables in 'max mix' groups of eight. Table work is self managed and there are just two facilitators for the whole event, supported by a small logistics team.

A set of actions normally emerges from the organisational alignment event and the design team will have put in place whatever is considered necessary for taking these forward: infrastructures, internal communication programmes, resource allocation procedures and so on.

The change effort should not be viewed as a big event and a few follow-up activities, but as a continuous cycle of planning, implementing and monitoring. Some of this work will be done in collaborative gatherings, and some will be done off-line. Events have their place, but RTSC is much more than events. It is a wholly different way of doing business.

Methods for work redesign

Participative Design

Primary purpose: quickly redesigning an organisation into self-managing workteams.

Developers: Fred Emery and Merrelyn Emery.

Length: one and a half to two days.

Group size: around 24 people.

Participative Design was developed in 1971 by Fred and Merrelyn Emery. They developed the model as a faster and more acceptable alternative to the Socio-Technical Systems approach, where a multi- functional task force redesigns the organisation, usually taking a whole year to do so. A design created in such a way tends to be flawed, because it is based on an incomplete assessment of reality. Also, workers do not have ownership of the design, and this generates resistance to change. And, perhaps most significantly, the organisation's underlying power structure remains intact.

Whereas STS is based on what the Emerys call the 'bureaucratic design principle', Participative Design reflects the 'democratic design principle'. This says that (1) those who have to do the work are in the best position to design the way in which it is structured, (2) effectiveness is greatly improved when teams take responsibility for controlling their own work, and (3) the organisation increases its flexibility and responsiveness when people are capable of performing multiple functions and tasks. The Emerys have also identified six basic conditions that need to be met if people's work is to be productive and satisfying. (Ref 4) There must be:

- elbow room for decision making;
- opportunities for continuous on-the-job learning;
- sufficient variety;
- mutual support and respect;
- meaningfulness;
- a desirable future, not a dead end.

The Participative Design process, which often follows on from a Search Conference, consists of three stages.

1. Pre-workshop activities:

- gaining the commitment of senior management and determining the minimum critical specifications and any necessary constraints for the new organisational design;
- educating the organisation about the value of the Participative Design approach.

2. The Participative Design workshop.

Participants work in groups of six to proceed through the three parts of the workshop:

Analysis

Participants assess how their work is currently structured and notice to what little extent the six conditions are being met.

Design

Participants create a work flow design and organisational structure based on the democratic design principle and the six conditions.

Implementation planning

Participants agree measurable goals (these will later be negotiated with management), determine training needs, agree procedures for work co-ordination and other key activities, and identify the resources that will be needed.

Management's ratification of the design takes place either at the end of the workshop or very soon afterwards.

3. Post-workshop implementation.

The design that emerges from a Participative Design effort will only succeed if any existing command and control culture is replaced with a collaborative one where people control their own work. If the senior managers are not fully committed to making this fundamental change, the effort will fail, no matter how good the design.

Methods for surfacing and facilitating the discussion of issues and opportunities

Open Space Technology

Primary purpose: creating a forum where issues and opportunities are surfaced, discussed and translated into action.

Developer: Harrison Owen.

Length: one, two or three days.

Group size: limited only by size of venue.

Open Space Technology is a method for organising a self-managed gathering where participants create their own programme of work sessions linked to an explicit theme. In these simultaneous sessions people discuss their heartfelt concerns, explore issues and opportunities and find new ways forward. An Open Space gathering brings people together – often in large numbers and usually representing enormous diversity – to contribute their views, share their ideas and develop plans for creative and collaborative action.

The Open Space approach is particularly effective when there are high levels of complexity, diversity and conflict, and when urgent action is required. A prerequisite is that the focal issue or theme must be of genuine concern to all involved. The group can be of any size, from 10 people to 1,000 or more. All relevant stakeholders are invited, but participation is generally voluntary. The event can be of any length – usually one, two or three days.

Open Space is based on five principles and one law:

- Whoever comes are the right people. (Participation is voluntary and more participants is not necessarily better.)
- Wherever it happens is the right place. (If no 'official' meeting place is available, go and find one.)
- Whenever it starts is the right time. (Be relaxed about time.)
- Whatever happens is the only thing that could happen. (Let go of your expectations.)
- When it's over, it's over. (If there's no more to say, move on.)
- If you find yourself in a situation where you are neither learning nor contributing, it is your responsibility to

use The Law of Two Feet to go elsewhere.

This is what happens at an Open Space event:

1. Participants gather for the opening plenary. They sit in a circle, to indicate that everyone is a leader.
2. The facilitator states the theme of the event, describes the Open Space principles and explains what is going to happen.
3. Anyone who feels so inspired can offer one or more sessions (such as a presentation, workshop, discussion group or task force) by creating a simple poster showing the title of the session and his or her name, making a brief announcement to the whole group and choosing a time and a space for the session to take place.
4. The posters are fixed to the wall and participants sign up for the sessions that they wish to attend. Much negotiating usually occurs at this point: conveners offering sessions on similar topics may decide to join forces and people may ask certain conveners to re-time their sessions to make participation possible.
5. Participants then self-organise and pursue what interests them.
6. The large group reconvenes at certain points and at the end of the event to share what has transpired.
7. There is often an additional plenary session for prioritising issues and developing action plans in project teams.
8. At the end of the event everyone receives a set of reports from all of the sessions, which usually include action points.

Simu-Real

Primary purpose: providing an opportunity for the organisation to learn about itself, make changes to its way of working and accomplish a major task.

Developer: Donald Klein.

Length: one day.

Group size: limited only by size of venue.

Simu-Real enables members of an organisation to work together on a real organisational task so that they can see the whole organisation in all its complexity, become aware of, and skilled in, dealing with organisational dynamics, and determine what, if anything, needs to be changed. The method is used to help organisations explore differences, solve complex problems, redesign work processes, agree goals and develop plans for realising them.

The Simu-Real event takes place in a large room which, when the participants arrive, becomes a microcosm of the organisation in action. The departments or other organisational units are located in different parts of the room according to their place in the actual organisation. This is the ‘Simu’ part of Simu-Real. The ‘Real’ part is the task or project that the organisation will undertake. The task is conceived by a planning committee, whose members are drawn from the organisational units. The committee prepares all aspects of the Simu-Real event including the room layout and the decision making process (this is explained below).

The Simu-Real process consists of three action periods, each around one hour in length. During these periods the participants address the task exactly as they would if they were at work. Each action period is followed by an analysis session, lasting around 45 minutes, in which the small groups reflect on what worked during the action period and what did not work so well, and decide what they will do differently

during the next action period. The findings of the small groups are shared in the large group. After the third and final analysis session the management team or other decision making group meets in the centre of the room, fishbowl-style, to decide what changes need to be made in the light of the day's events. The planning committee will have already agreed the form of the decision making process with participants prior to the event.

Principles for creating collaborative gatherings

A principle is 'a general truth forming a basis for reasoning or action'. (Ref 5) By mastering the principles that are common to all LGI methods, you will be able to create your own methods that address the unique needs of each particular situation.

Principles for collaborative working

The whole has greater wisdom than the sum of the parts

Include everyone – external as well as internal stakeholders – who can contribute information, ideas and different perspectives, everyone whose support is vital to the success of the project and everyone who has the power to make things happen.

Everything derives from purpose and outcomes

Plans cannot be made until purpose and outcomes are clear, so first spend time agreeing the reason for your collective existence and then decide what you want to achieve together.

Principles determine behaviour

Agree your guiding principles for working together, such as being open and honest with each other, treating one another with respect and honouring commitments.

An honest assessment of current reality is a solid foundation on which to build the future

People must be completely honest, even if this means raising painful or taboo subjects. The completed picture of current reality is likely to be messy and complex.

Ownership and commitment emerge from an egalitarian approach

Collaboration will only be effective if parent-child relationships are abandoned in favour of adult-adult ones.

People need to feel they are part of a community

What really matters to most people is not money – it is feeling part of something bigger than themselves, something they can believe in that brings meaning to their lives.

Principles for designing collaborative gatherings

The most effective design is one created by a design team

The design of collaborative gatherings is not done by an elite group or delegated to one or two people, but is created by a design team composed of people from the different stakeholder groups that will be present at the gathering.

Collaboration is a continuing process, not an event

Treat the gathering as one small part of a continuing process. Put in place a temporary infrastructure to co-ordinate the efforts of any project teams that form during the gathering and ensure that these teams get support and resources from the formal organisation. Think about how to involve those who will not be present at the gathering, and consider how to use internal communication and other tools to keep everything moving forward.

The people attending the gathering are active participants, not a passive audience

Do everything possible to minimise dependence and passivity, maximise active participation and mobilise individual and collective power. Ensure that chairs are arranged in one or more circles and small groups are self-facilitated. Exclude games, training modules and speeches.

People need time to connect and reflect

Give participants time to connect with themselves, their fellow participants and the task, and time for reflection. And no exceptions.

Wisdom comes from an appreciation of the whole system

Invent activities that enable participants to experience the whole system in action and understand the context in which it operates.

Make decisions in real time, not off-line, and begin implementation immediately

Do not allow leaders to use collaborative gatherings to gather data for later behind-closed-doors decision making.

Engagement means engaging the whole person

Make sure that activities engage the whole person – mind, body, emotions and spirit, and involve all of the senses – sight, sound, taste, smell, touch and movement.

Effective gatherings require healthy conditions

Choose a venue where the main meeting rooms have plenty of daylight and ventilation, the seating is comfortable and good food is served quickly. Let participants help themselves to tea, coffee, soft drinks and fruit throughout the day.

Principles for facilitating collaborative gatherings

The facilitator is there to hold the space

Create a safe space where participants feel free to express themselves openly and take risks. Hold the vision and encourage the group to stay open to new possibilities and creative breakthroughs, even in the midst of chaos, conflict and breakdown.

Facilitation requires a participant focus

Work with what is happening rather than what you think should be happening, and be highly responsive to the needs of the whole, making any necessary adjustments to the programme right there on the spot. Assume that the group knows best what it needs at any given moment.

Less is more

Take a minimalist approach. Never do anything yourself that could be done by participants. Ensure that power remains with the group and do not do rescue work. Only make an Intervention when absolutely necessary, preferably at the invitation of the participants.

There is strength in diversity

Embrace all opinions and viewpoints as part of current reality. Assume that behind all behaviour there is a positive intention. Ensure that those who express opposite points of view or behave unconventionally are not marginalised by the group. Ask: "Does anyone else feel like that?"

Questions frequently asked by training and development professionals

It is becoming increasingly common for training and development professionals to get involved in the creation of collaborative gatherings. Should you find yourself in this position, the following list of frequently-asked questions could prove useful.

Do we need to train people in things like communication skills prior to taking part in a collaborative gathering?

No. Collaborative gatherings give people a chance to exercise skills they already have, and learn new ones 'on the job' through experimentation and role modelling.

I'm concerned about the participants' ability to self-facilitate. Is it OK to bring in a team of facilitators to lead the small groups?

There is often a strong temptation to do this, but unless it is firmly resisted, the result will be dependence and little will change.

How can we ensure that members of the leadership team walk their talk?

Internal or external consultants can coach the team members before, during and after the collaborative gatherings.

Can we use collaborative gatherings to train large numbers of people in the use of a strategic tool such as TQM?

Collaborative gatherings are a legitimate alternative to the slow and sub-optimal cascade method. But tread carefully. People can get resentful when they feel something is being done to them, and you are unlikely to generate the necessary levels of long-term ownership and commitment through any form of manipulation or indoctrination, no matter how subtle.

We have an urgent need to conduct a company-wide training needs analysis and are considering the use of collaborative gatherings. Is this a good idea?

Yes. Collaborative gatherings usually whet people's appetite for training and development, and people will probably welcome an opportunity to create their own development plan. Training and development programmes then become strategic instruments as they are driven by immediate business needs identified by participants during the gatherings.

References

1. Inspired by a model that appears on page 314 of The Fifth Discipline Fieldbook: Peter M Senge, Charlotte Roberts, Richard B Ross, Bryan J Smith, Art Kleiner (1994), Nicholas Brealey.
2. Jack Martin Leith – contact information below.
3. The three categories of LGI method are based on distinctions made by Billie T Alban and Barbara Benedict Bunker (1997), Large Group Interventions, Jossey-Bass.
4. Robert Rehm (1994), Participative Design, self-published booklet.
5. (1984), Concise English Dictionary, Omega Books.

About Jack Martin Leith

In his 20s Jack embarked on a wide-ranging and long-running inquiry to discover how the new comes into being, and how this changes into that, beyond prevailing models and methods.

This work culminated in the formulation of *rigateur*, a person who deploys their rig – their natural-born create-the-new capability – to transcend the mundane, imagine tantalising possibilities, create the new and enrich the world, or a particular piece of it, with value, meaning and joy. Rigateur also refers to the rigateur's way of thinking, doing and being.

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