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## Large group interventions as a tool for community visioning and planning

Janet Michelle Hammer\*

*Portland State University, College of Urban & Public Affairs, PO Box 751, Portland, OR 97207-0751, USA*

Large group interventions (LGIs) are a type of multi-stakeholder process designed to “get the whole system in the room” in order to develop shared understandings and agreements. LGIs are said to be well-suited to the conditions of complexity, plurality, and uncertainty that are often associated with community visioning and planning settings. However, there is little research regarding what reasonably to expect from large group intervention processes and how best to design them. Sharing findings of a multi-stakeholder large group visioning and planning process in the Pacific Northwest, this article informs understanding of how and why large group interventions work, and their applicability to community visioning, planning, and development.

**Keywords:** planning; organizational development; large group interventions; multi-stakeholder process; democratic theory and participation

Large group interventions (LGIs) have been used across the globe to address such diverse community issues as watersheds, food systems, forestry, health care, education, and economic development. However, questions remain regarding what reasonably to expect from these processes, how best to design them, and their applicability to community visioning and planning contexts. This article draws on findings from a large group visioning and planning process in the Pacific Northwest to address these questions.

We begin with an introduction to the concept of large group interventions and an overview of the case study research. Case outcomes are then presented, followed by a discussion of concordance with large group intervention design theory. Consideration is given to how and why large group interventions may be effective for community visioning and planning, including how large group interventions can support overall community development. Potential limitations and unresolved questions regarding large group interventions are also addressed. These findings are valuable to practitioners who seek to design more effective community visioning and planning programs and understand how LGI processes contribute to the achievement of overall community development goals.

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\*Email: [hammerj@pdx.edu](mailto:hammerj@pdx.edu)

### **Large group interventions**

LGIs are multi-stakeholder processes that aim to “get the system in the room” to address change. These processes are designed to engage a critical mass of system members in:

- (i) understanding the need for change; (ii) analyzing the current reality and deciding what needs to change; (iii) generating ideas about how to change existing processes; (iv) and implementing and supporting change and making it work (Bunker & Alban, 1997, p. 15–16).

There are many types of LGI methods, each more or less suited to specific outcomes (e.g., visioning, structuring working relationships, improving understandings and relationships) (Bunker & Alban, 1997; Griffen & Purser, 2008; Holman et al. 2007). LGI methods vary among a number of attributes including event duration, methods of participation, flexibility of format, number of participants, and type of follow-up. However, while LGIs methods vary on some attributes, most are informed by four core design principles. The whole system principle suggests that involvement by the full range of system stakeholders will yield a more robust understanding of the system and foster the development of relationships necessary for effective action. The constructivist principle suggests that reality is co-created through social interaction and that shared understandings and relationships can be developed when people engage in dialogue. The participatory principle suggests that people will support or “own” what they help create and that various group dynamics can foster (or inhibit) engagement and commitment. The future principle suggests that orienting activities toward defining and achieving future visions rather than solving current problems will create an environment that more effectively unleashes people’s energy.

Bunker and Alban (1997) identify four specific issues that need to be addressed when designing LGIs. First, small group task-oriented activities should be included to counter both the lack of “air time” (opportunities to speak) and reduced sense of responsibility that can emerge in large group settings. Second, event design must provide enough structure to guide participants, but not so much as to be constraining or so little as to be disorienting or overwhelming. Third, event design must provide people with opportunities to hear other perspectives. Fourth, appropriate structure and facilitation needs to be provided so that positive and negative energy flows in the group can be successfully navigated.

### **Case description**

This action research case study was designed to improve understanding about what reasonably to expect from LGIs and how best to design them. The visioning and planning effort took place in the metropolitan region of Portland, Oregon between April 2002 and June 2006. The effort consisted of two components: a large group intervention event (Forum) and a collaborative management work group that addressed follow-up to the Forum. The goals of the Forum were to: (1) develop a shared vision for the region’s food system; (2) build bridges and partnerships between individuals and groups working on various facets of sustainable community food systems in the region; (3) increase individual and collective understanding about the issues; and (4) define action strategies to support sustainable community

food systems in the region. The following paragraphs review the research design and describe the LGI event, focusing on how the LGI principles defined above were applied in this case. Research findings specific to the collaborative management work group are reported elsewhere (Hammer, 2007).

### **Research design**

This was a quasi-experimental, longitudinal, action research case study. Quantitative and qualitative methods were used in a complementary fashion to generate rich, valid, reliable findings. Five data sources were triangulated to inform understanding of the case. These include: (1) baseline and nine month follow-up survey of Forum participants and a control group; (2) event evaluation survey administered at the Forum; (3) interviews with planning team members; (4) archival data (e.g., Forum proceedings, meeting minutes, email and listserv records, reports, proposals, and announcements); (5) participant-observer notes. The research addressed questions regarding the outcomes of the LGI event as well as alignment between the LGI event and theory about “good” LGI design.

### **Description of the large group intervention event**

As per LGI theory, the Forum was planned with input from diverse system stakeholders. Titled *Growing the Regional Food Economy: A Forum for Promoting Good Jobs, Food Access, Environmental Stewardship, and Farm Viability*, the event design was informed by the four core LGI principles, as well as by theory relevant to adult learning, dialogic practice, and learning for social change and sustainability (see Hammer, 2007). Drawing on learning theory, a variety of activities were included in order to accommodate diverse learning styles and ways of knowing, and to create an environment that would be psychologically and physically supportive of learning. Dialogic theory was an influence as the event aimed to cultivate a quality of respectful listening and engagement and create a space that could foster exploration, reflection, creativity, empathy (perspective taking), and integration (recognizing interconnectedness). Drawing on learning theory for social change and sustainability, issues of ecological and social justice were surfaced and linkages between power and knowledge were considered (e.g., in the content of the event and the creation of space for authentic participation by diverse participants). The Future Search method<sup>1</sup> served as a source of great inspiration for this research, though was not applied to this LGI event because the design does not provide for discussion about areas of conflict, suggesting that to do so diverts attention from productive work on areas of common ground. The event planners in this case believed this strategy to conflict with important dialogic principles.

The event location and provisioning were selected for their ability to model sustainability. The event was free of charge in order to reduce barriers to participation. Information was sent to participants prior to the event to help orient them, set expectations, and provide structure and boundaries. Efforts were made to recruit participants representing the full range of system stakeholders, including key stakeholders of influence who should be “at the table” during the process of defining and implementing projects in support of regional community food systems. Screening criteria included leadership role in a key stakeholder organization or community, diversity (i.e., rural-urban, race and ethnicity, age, gender, food system

sector represented), and ability to consider different perspectives and work with others. The Forum attendance was approximately 100 (with minor fluctuations during the event) and met the planning team's target. As discussed below, despite diligent recruitment efforts, the diversity of stakeholder participation was not as broad as desired.

The keynote presentation, made on the first morning after a welcome and orientation, discussed linkages between rural and urban communities and common roots to the problems they face—those of certain habits of mind, taken for granted assumptions, and accounting methods not based on ecological economics or the realities of living systems. A question and answer period followed the presentation. This Forum section was designed to introduce systems thinking, ecological economics, and critical reflection about conventional thoughts and practices.

Following the keynote, a regional food system leader introduced the concept of healthy or sustainable regional food systems in an accessible, compelling presentation. The purpose of this Forum section was to begin to establish a common language and frame of reference, concretize abstract principles, contextualize the subject of regional food systems, continue the cultivation of systems thinking, and engage both head and heart. This activity was very well-received, with numerous requests for the presentation.

After a break, participants moved into pre-assigned heterogeneous small groups to address the question of how a healthy regional food system should be defined and measured. The purpose of this Forum section was for diverse members of the system to start to get acquainted and begin articulating a shared vision for the region's food system. The intent was to work on something "concrete" in order to address the interests of participants eager to do more than "just talk or vision," while implicitly generating a sense of shared vision expressed in statements regarding the definition of a healthy food system.

A planning committee sub-team synthesized the small group definitions of a healthy regional food system and reported the results to the large group after lunch. The purpose of the report back was to acknowledge the work completed in the small groups, identify the areas of common ground, begin to define a sustainable regional food system, and set the stage for the next activity.

Next, there was a two-and-a-half hour modified Open Space<sup>2</sup> session designed to identify and lay groundwork for projects likely to effectuate positive movement toward a sustainable food system in the region. Participants self-selected into small groups. Each group was asked to address: (1) Do we need a project like this? Why? What gap does it fill? (2) What would it look like if it were successful? (3) What do we need to do to get there? Action agendas were defined and group coordinators identified.

At the end of Day One a recap was provided in order to reorient participants to where they had been and what to expect the following day. A Declaration was introduced and participants were offered the opportunity to provide feedback on the statement. The Declaration was designed to foster a sense of group identity and shared vision, appreciation for system interconnection, and commitment to working together toward a sustainable regional food system. A reception was held to allow additional time for relationship building.

Day two of the LGI event began with a review of the prior day and overview of the coming day. This activity was designed to acknowledge the substantial work done thus far and orient participants to the day's coming activities. Participants were

invited to view the “gallery” of action agendas generated during the Open Space sessions and add their name if they were interested in joining the group or providing comments or suggestions.

The next activity involved two sets of paired panelists sharing concrete, compelling stories about an aspect of sustainable food systems. The first panel provided a glimpse into relationships between producer and marketer via the intertwined stories of the CEO of an independently owned regional grocery store chain known for its commitment to sustainability and service, and a founding member and leader of a sustainability certified ranching cooperative that sells to the store. The second panel provided a glimpse into issues of community food security and youth empowerment via the intertwined stories of the Gardens Program Manager for a regional food bank working to address root causes of hunger, and a teen member of their Youth Farm Crew program. Panelists were chosen to represent rural and urban perspectives and were requested to highlight economic, environmental, human, and cultural sustainability. The purpose of this Forum activity was to help participants envision values-based relationships between people and the planet in a sustainable food system. Time for questions and answers was allotted. This activity was one of the highest rated and most memorable.

After the panel session, two well-regarded university faculty with experience in dialogue (a business school Dean and a professor of community health) introduced the concept of dialogue and invited participants to respond to the following: “After the last two days, what question are you living with?” The purpose of this activity was to provide a space for reflection, critical thinking, integration of the Forum experience, hearing different perspectives, and building understandings and relationships.

The dialogue exercise was followed by lunch, and a closing activity that included a review of Forum follow-up, time to complete the Forum evaluation and next steps survey, and an opportunity to sign the Declaration. This Forum component was designed to help contextualize and integrate the past two days’ events, acknowledge participation, and provide a sense of direction for future action.

## **Outcomes**

Six overarching themes were identified with respect to Forum outcomes. Reported below, these include: substantive learning, relational learning, inspiration, viewpoint clarification, tangible effects, and domain development.

### ***Substantive learning***

Respondents’ self-rating regarding increased understanding about the region’s food system was strong and stable over time. On the evaluation administered at the LGI event, respondents’ mean response to the statement, “At the Forum I increased my understanding about the health of this region’s food system,” was 4.25 on a five-point Likert scale.<sup>3</sup> This finding was consistent nine months later (mean response to the same question was 6.05 on a seven-point Likert scale).<sup>4</sup> Substantive learning occurred even though respondents had a fair degree of prior knowledge: the mean score to the statement, “Prior to this Forum I had a high level of knowledge about regional food system issues” was 3.59 on the five-point scale. Further, learning occurred in a manner reflective of the whole system design principle. As one

participant said, “It broadened my knowledge of all the elements of a healthy food system. Now I understand the food system better . . . Yeah, deeper understanding of the different components of the food system.”

### ***Relational learning***

At the time of the Forum, the mean response to the statement, “I made contacts that will be helpful to my work,” was 4.45 on the five-point scale. Forty respondents (60%) identified relational learning when asked, “In what ways do you think attending this Forum will impact you professionally?” and 16 respondents (25%) noted relational effects when asked, “In what ways do you think that attending this Forum will impact you personally?” For some participants, the learning was of a processual nature. For example, “It made me more of a listener, networker and opened my eyes to more potential.” In some instances, relational learning was connected to a sense of inspiration, as discussed below.

The interviews and follow-up survey also provided evidence for the cultivation of both bridging and bonding relations (e.g., identified a resource person, created a working partnership, developed a deep and enduring friendship). Said one interviewee, “If we start looking at the overlaps here it would be really interesting . . . I can just imagine this chart of different groups or individuals . . . You’re proving the substantial gains of building social capital.”

### ***Viewpoint clarification***

Results from the Forum evaluation and follow-up survey indicate that respondents’ self-rating of clarification of personal beliefs and values was strong and stable over time. At the time of the Forum, respondents’ mean score was 4.21 on a five-point Likert scale to the statement, “Participating in the Forum helped me clarify my own beliefs and values about sustainable food systems.” Nine months later on the post-survey, the mean response to the same question was 5.80 on the seven-point Likert scale.<sup>5</sup> The interview findings also indicate that individual participants were able to change their thinking about issues or people. Said one interviewee:

It’s been very interesting to be challenged to think and see alternative points of view and perspective . . . having had a chance to really begin to stop and kind of look and say “Well then what are the ways and ideas that those two perspectives which are both valued begin to be reconciled?” And for me it’s beginning to come out in this way [explains new way of thinking that’s emerged].

Changes in viewpoint appear mostly to reflect a change in attitude about others and their perspectives rather than a shift in fundamental personal values or beliefs. For the most part, viewpoints tended to expand rather than narrow. For example, one respondent noted that her values had not changed but that she felt more compassion for others and their actions now that she better understood their circumstances.

### ***Inspiration***

In some instances, participants noted a sense of inspiration, hope, or commitment when asked how attendance at the Forum would impact them personally or professionally. Examples of their comments include: “Inspirational stories that will

impact my perspective on my own personal power,” “Sustain my values and beliefs,” “Reinforced my desire to be part of social change,” “Felt like part of a movement,” and “Gave me hope. Made me joyful.”

Similar themes of connection, inspiration, and commitment were identified in the interviews. For example, “At the April Forum, I finally felt like this was my community because I met so many people who were interested in the same things I was.” Said another, “It’s been spiritually energizing to associate with a group of people with so many varied interests and goals. And appreciate that we really are part of one large system, one larger mission to build a sustainable food system.”

### *Tangible outcomes*

Tangible outcomes were attributed to the LGI—some directly and some indirectly (e.g., a project developed between two people who met at the event but not as part of an action agenda).<sup>6</sup> Direct and indirect tangible outcomes included new programs and products, enhancements to existing programs, and behavior changes such as altered shopping patterns.

It is important to note that most of the action groups defined at the Forum did not continue to meet and few of them completed identified action steps. At the same time, despite the lack of explicit implementation of action agendas, content from seven of the eight Open Space groups made its way into programming of the collaborative management group or programming of other organizations. Tangible outcomes that aligned with the action agendas were achieved, although mostly not through explicit agenda implementation.

### *Domain development*

A difficult to measure, though important outcome, was the influence of the LGI on the regional food system.<sup>7</sup> The LGI helped to bring visibility and legitimacy to food system issues and fostered the development of networks and partnerships to address these issues. As one interviewee noted, “people in various parts of the food system or working on food system issues became more aware of what others in the food system do and got them to cross-fertilize and work on things together.” Noted another, “I think they’re bringing a lot of people in under the tent. They’re including a lot of people that might not have seen themselves as being connected with this comprehensive effort creating a healthy regional food system.” Impacts on programming were evidenced across a range of topics including school lunches, extension services, community and learning gardens, and community food assessment. This research supports the suggestion that LGIs may contribute to domain development by facilitating the three iterative and overlapping phases of “problem-setting” (identifying stakeholders and coming to appreciate system interdependence and existing conditions), “direction-setting” (developing a shared vision and strategy) and “structuring” (developing a regulative framework) (Brown, 1980; Gray, 1985; McCann, 1983; Trist, 1983).

### **Concordance with LGI design theory**

Having considered Forum outcomes, we turn now to questions of whether and how LGI design theory was supported by this case. As noted earlier, LGIs are predicated

on getting the “whole system” in the room. However, challenges recruiting and involving the full diversity of stakeholders have been documented in the literature and were observed in this case as well. On the Forum evaluation survey, the mean response to the five-point Likert scale question, “All or most of the relevant interests in the region’s food system were represented at the Forum” was 2.87 (2 = disagree and 3 = not sure). Concerns about a lack of diversity, particularly with respect to food and farm businesses and low income and minority populations, also were noted by close to one-third of interview and survey respondents. On the other hand, some respondents positively remarked upon the amount of diversity in the room. Most importantly, the level of diversity was sufficient to support understanding, relationship-building, and action planning goals associated with the whole system principle.

The combination of activities and group sizes appears to have worked well, with some respondents providing positive feedback about the speakers, some for the break-outs, and some for the mix. The LGI literature is conflicting with respect to the introduction of information by “experts.” One view suggests that knowledge to understand and shape the system is held by the participants in the room and the introduction of speakers fosters dependency behaviors. Another view suggests that inclusion of speakers can be appropriate and useful (e.g., accommodate diverse learning styles, introduce new information)—particularly when there is an opportunity for question or critique (e.g., Daniels & Walker, 1996; Pelletier, McCullum, Kraak, & Asher, 2003; Schusler, Decker, & Pfeffer, 2003). This research supports the latter view. Many survey respondents noted how valuable the presentations were for providing both information and inspiration.

Visioning activities in this case were implicit rather than explicit (e.g., the small group work defining indicators of a sustainable regional food system, Declaration signing, envisioning positive futures). This approach was selected to accommodate time constraints as well as planning team concerns about “getting down to work.” Interestingly, although a specific visioning exercise was not included, participants felt that “the Forum provided a good start toward building a shared vision for the region’s food system” (4.25 on a five-point scale). At the same time, the decision to leave out an explicit vision component may have short-changed some learning, vision building, or planning objectives, at least for some participants. As one survey respondent noted, “There was a lot of vagueness, a lot of ideas that need to somehow come together. I don’t think we’ve collectively identified how we see our pieces as an effective whole.”

Many of the action plans were not implemented, raising significant questions about the LGI premise that people will “own” and implement what they help to define (e.g., Oels, 2002; Pelletier et al., 1999; Schafft & Greenwood, 2003; Schusler et al., 2003). In some instances the “action plans” were not sufficiently articulated, in others the full complement of stakeholders needed to move forward was not present. Resources were also a constraint. As one participant wrote, “While we support the project idea . . . our organization has a lot on its plate and would rather focus on a few projects to ensure they’re done well and avoid getting spread too thin.” It is also possible that participants “united” by an interest simply did not want to work together. The findings regarding action plan implementation pose a serious challenge to the Open Space axiom that “whoever comes are the right people” (Bryson & Anderson, 2000, p.151), and support the suggestion that significant follow-up may be required to implement action plans developed in the large group setting (e.g.,

Schafft & Greenwood, 2003). At the same time, as noted earlier, many of the action priorities did make their way into other work plans and projects. Thus, additional metrics may be necessary for evaluating the action component of large group interventions and communicating product and process achievements (e.g., Innes & Booher, 1999; Schafft & Greenwood, 2003).

The Forum evaluation indicates that, for the most part, design objectives were met and the event was considered to be “worthwhile” (mean score of 4.54 on a five-point scale). Building on these findings regarding what to expect from LGIs and how best to design them, the following sections consider implications for visioning and planning in a community development context, including unresolved issues.

### **Implications for community development**

Understanding how and why LGIs work provides a powerful insight regarding their applicability to community development settings. LGI processes can create the time and space for learning to occur and relationships to develop. The stories and conversations shared may foster bonds and solidarity, provide normative guidance, or fuel a sense of the possible (e.g., Ganz, 2001; Sandercock, 2003). A positive tone and learning orientation, reinforced with ground rules and norms, may facilitate creation or transformation of relationships as well as generative and expansive thinking (e.g., Finegold, Holland, & Lingham, 2002; Fredrickson, 2001; Poncelet, 2001a, 2001b). Networks, norms, and trust may be developed and the bridging and bonding capital created can lead to a number of positive benefits (e.g., knowledge transfer and creation, and development of new or altered programs). Appreciation of system interrelatedness may be cultivated—an appreciation that can help participants contextualize their work and, for some, foster a sense of cohesion, integration, or connection. For some participants, the experience is almost “magical,” eliciting feelings of inspiration, hope, or a sense of movement or community (e.g., Bunker & Alban, 1997; Poncelet, 2001a, 2001b).

To the extent that LGI processes foster solidarity (shared identity and norms) and agency, networking, congruence of frames, and community capacity they can be seen as a potent force for community and movement development (Bhattacharyya, 2004; Gilchrist, 2000). Where LGIs enhance understanding, inspire care and a sense of capacity, and develop networks and norms, they may foster the cognition, motivation, and obligation identified as necessary for meaningful change in human systems (Gersick, 1991). When LGIs facilitate shared understanding of an issue, and the development of a shared vision, strategy, and operating framework, they can be an important contributor to domain development (Trist, 1983).

While these and other findings clearly demonstrate that large group interventions can be an effective tool for visioning and planning in support of community development objectives, a few issues and questions remain. Addressed below, three significant issues include agenda implementation, stakeholder recruitment, and engagement practices.

### ***Implementation of plans***

Issues regarding action agenda implementation suggest that design of, and expectations for, the planning component of LGIs needs revisiting. As Senge and Scharmer (2001) note, “‘self-organizing’ cannot always be left to itself” (p. 245). It is

naïve to think that by simply getting people “in the room” individuals will succeed in defining and implementing action agendas (e.g., Pelletier et al., 2003; Schusler et al., 2003). LGI events are but one piece of a larger change process and care must be given to appropriately address pre- and post-event follow-up. On the front end, event designers must consider how issues such as scope, participants, and agenda will impact the articulation and implementation of shared visions and plans. Further, participants should be provided with clear information regarding roles and anticipated outcomes so that expectations for the process are reasonable and ownership is fostered (e.g., Oels, 2002; Schusler et al., 2003). Following the event, appropriate structures, resources, and supports must be provided for successful agenda implementation (e.g., Foster-Fishman, Berkowitz, Lounsbury, Jacobson, & Allen, 2001; Gray, 1985; Huxham, 2003; Margerum, 1999). Further, appropriate recognition should be given to the fact that intangible and secondary or indirect effects may be the most significant (e.g., Innes & Booher, 1999; Oels, 2002; (Pelletier et al. 1999) Schafft & Greenwood, 2003).

### ***Stakeholder recruitment***

As noted earlier, securing key stakeholder participation can be difficult. In any instance, a host of structural or individual constraints may be present. For example, stakeholders may not feel the issue is a priority, may not have resources to allocate to participation, may feel alienated from the discourse or distrust the convener, or may have turf issues (e.g., Everett & Jamal, 2004; Gray, 1985, 2004; Margerum, 1999; Schafft & Greenwood, 2003). Sincere and strenuous recruitment efforts are important, but not to the point of paralysis (Grubbs, 2002). It may be that visionary or early adopter stakeholders participate in an initial event and then others join in as the process itself stimulates a shift in salience (Trist, 1983; Weisbord, 1992). When new participants do join the process, efforts to effectively integrate them must be made (e.g., Gray, 1985; Huxham & Vangen, 2000).

When recruiting participants, it is helpful to be clear whether they are representing a particular group or organization or are considered representative of a group (i.e., empowered to speak and act on behalf of the group, or present as part of a sample reflecting a range of interests and opinions) (Huxham, 2003; Margerum, 1999, p. 185). When individuals are viewed as representative of a group, it is important that they not be “put in a box” – recognizing that people often manage multiple identities (e.g., mother, executive, environmentalist, African American), and that individuals with specific identities or population characteristic do not necessarily hold a unitary perspective (i.e., not assuming there is a shared viewpoint associated with specific groups such as student, farmer, immigrant, veteran). When an individual is serving as a representative of a group or organization, it is imperative that s/he acts as a conduit between the LGI process and the group being represented. Communication and coordination needs to be addressed and organizational roles, responsibilities, and rewards specified.

### ***Engagement practices***

Though seemingly obvious, it is important to remember that a range of strategies may be necessary to effectively engage diverse stakeholders. For example, inclusive and appropriate language may be helpful to participants who feel out of their

element, and strategies can be designed to ensure that participants don't feel like tokens or outnumbered representatives. Further, where LGIs typically privilege participants who have verbal facility and feel comfortable speaking in groups, diverse participation methods (e.g., writing, art, drama) may provide opportunities for others to be heard. Such techniques can also be useful for unleashing creative thinking and for promoting perspective taking among the full range of participants.

Wood and Gray (1991) suggest the need to engage "head and heart" in collaborative settings. Depending upon context, strategies include acknowledging diverse ways of knowing, attending to personal and emotional matters, recognizing product and process as inseparable and inter-related, and fostering positive emotions such as hope and inspiration through illumination of interdependence and cultivation of a sense of connection, integration, and vision. As language shapes the world we see and what we know, stories and conversations can be particularly transformative, providing visions or examples of another way of being.

Processes that include reflection and dialogue may yield different results than those that do not (Everett & Jamal, 2004). Questions asked or avoided shape process outcomes: "the seeds of change – that is, the things people think and talk about, the things people discover and learn, and the things that inform dialogue and inspire action – are implicit in the very first questions we ask" (Ludema, Cooperrider, & Barrett, 2001, p. 198). Reflection and dialogue are suggested in order to examine assumptions and system contradictions, and to maximize the learning that can occur among diverse stakeholders. Suggested dialogic skills or virtues include attentive and genuine listening, suspension of judgment, respect for differences, patience, a spirit of curiosity, sincere and truthful expression, and willingness to reconsider one's own assumptions or ideas (e.g., Anderson, Cisna, & Clune, 2003; Burbules & Rice, 1991; Isaacs, 1999).

Ironically, although LGI processes are designed to engage diverse system members in learning and creative problem solving, participants sometimes evidence conflict avoidance behaviors that suppress examination of important issues. Attention should be given to these norms of cooperation so that the potential of LGI processes to succeed is not diminished (e.g., Poncelet, 2001a; 2001b). This includes attending to the ways that power is exerted, particularly with respect to agenda setting (e.g., Hardy & Phillips, 1998; Pelletier et al., 2003).

Finally, with respect to engagement, a contradiction arises with the fact that LGIs require ample amounts of time in a culture that is "short term and fast moving" (Bunker & Alban, 1997, p. 223). Time requirements for effective LGI often clash with the expectations, demands, or constraints of participants and potential participants (Everett & Jamal, 2004; Schafft & Greenwood, 2003). Yet, accelerating or truncating processes restricts the formal and informal spaces that can foster more effective and transformational outcomes.

## Conclusion

Getting "the system in the room" via large group interventions has been suggested as a useful strategy for defining common vision and developing the knowledge and networks necessary to realize that vision. This action research contributes to LGI theory and practice by applying essential LGI principles to the design and implementation of a community visioning and planning event and evaluating results over time. Interpreting the findings through a multi-disciplinary lens, we have

enriched our understanding of what reasonably to expect from large group interventions and how best to design them.

This research supports the proposition that well-designed and implemented large group interventions are generative spaces that can evidence a number of tangible and intangible, direct and indirect outcomes that are important for community visioning and planning. The research also contributes to our understanding regarding how and why LGIs work: whole system, constructivist, participatory, and future principles are essential components of LGI success (though they may look different depending upon context). Getting “the system in the room” does not mean that every person with an interest in the issue needs to attend the event: it does mean that a critical mass of people who are knowledgeable about various facets of the system need to participate. In the room, careful attention must be given to a host of engagement issues including systems thinking, power differentials, and the integration of head and heart.

This research suggests a healthy respect for the challenges of conducting successful LGIs. When contemplating whether to undertake a large group intervention and, if so, which method or methods to use, communities would be wise to work with a skilled facilitator familiar with the numerous and evolving LGI methods. This facilitation includes effectively guiding event planners and participants through new, and at times uncomfortable, territory—for example, addressing topics not easily broached, adopting new norms of communication, or working with unfamiliar populations. It is also essential to remember that the LGI event is just one episode in a larger change process. To be successful, pre- and post-event planning must be well thought out and resourced, and expectations for action implementation need to be clear, reasonable, and adequately supported. This includes understanding how best to structure the collaboration.

Large group interventions can be an effective tool to get “the system in the room” for visioning and planning. But they can do more than that. Designed well, LGIs can be catalytic—sparking ideas, connections, and inspiration that facilitate a community’s understanding of itself and its potential futures, and helping community members to work individually and collectively to achieve their shared vision.

## Notes

1. Future Search is a fairly well-known LGI method. Participants move through a set series of activities over 2 ½ days. Future Search and Search Conference share common roots. To better understand their similarities and differences see Bunker and Alban (1997) or Holman, Devane, and Cady (2007).
2. Open Space Technology is a self-organizing LGI technique. Conference attendees are offered the opportunity to “convene” a session on a topic that interests them, relevant to the main conference theme. Attendees self-select which session(s) they would like to participate in. This case embedded a modified Open Space design within the large group intervention (Forum).
3. Forum evaluation survey: 1 = Strongly Disagree; 2 = Disagree; 3 = Not Sure; 4 = Agree; 5 = Strongly Agree.
4. Nine month follow-up survey: 1 = Strongly Disagree; 2 = Disagree; 3 = Mildly Agree; 4 = Not Sure; 5 = Mildly Disagree; 6 = Agree; 7 = Strongly Disagree.
5. Standardized mean scores from different scales are calculated as  $S = ((O - L) / (H - L)) * 10$  where S is the standardized score, O is the original rating score on one of the scales, L is the lowest possible score on the rating scale used, and H is the highest possible score on the rating scale used. Standardized scores for the pre- and post-survey were 81 and 84, respectively.

6. Standardized score of 80 for both pre- and post-survey.
7. Direct outcomes are sometimes referred to as primary or first order impacts or effects, and indirect outcomes may be referred to as secondary or second order impacts or effects.
8. In organizational development literature, a domain is an issue or topic area that is too broad and complex to be dealt with by any one organization (Trist, 1983).

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