

How We Learn and How to Change

Use Conversations for Collaborative Reflection about Complex Adaptive Systems

By Lisa Kimball, Executive Producer, GroupJazz (Interviewed by Patricia Seybold)

March 28, 2013

NETTING IT OUT

Every once in a while, I meet an extraordinary person who is generous enough to tell me her story and to share the experiences that shaped her thinking. My path has crossed with Lisa Kimball's a few times in the past, but, when we re-met at the [BIF-8](#) conference, we decided to spend a bit more time together.

This is an interview in which I simply ask Lisa Kimball to tell the story about the trajectory of her career to-date. The particular areas of interest for me—and the things I asked about—were:

- Her discovery of the importance of experiential collaborative learning in work with children, teachers, and business executives.
- The importance of designing learning environments and interaction structures that promote whole group discussion and reflection.
- Her discovery of the core competencies that distinguish super-performing executives from average executives, including their ability to interact with complex systems and their preferred approach to problem-solving: engage with the whole system.
- Her very early work with online communities (before the Internet) as the co-founder of the longest continuous online community engaged in strategic conversations—The Meta Network, now in its 30th year.
- Her mastery of, and fascination with, structures for designing effective group meetings—not just for off-site retreats, but for embedding these structures in how we do work when we're in our offices interacting with people on a day-to-day basis.
- Her generosity in documenting the best of these “Liberating Structures” to share freely with anyone who would like to learn and practice them through her free, online book: [Engaging Everyone with Liberating Structures](#).
- Her commitment to transfer the knowledge of how to change conversations as the best way to change organizations without needing to rely on a consultant or other outside expert in organizational development.
- The results that one of her institutions—the Plexus Institute—has achieved in healthcare through the use of some of these liberating structures.

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RANDOM WALK: COLLABORATIVE LEARNING FROM KIDS TO TEACHERS TO EXECS

Lisa, your work is fascinating to me. You've moved from education to management development, to collaborative technologies, to complexity theory. You've helped many people bring about change in complex systems. What's your background? How do you know what you know?

Lisa Kimball: In the past number of years, I've been interested in issues related to complexity science, and my favorite one is retrospective coherence, which means that I could make up a story that all makes perfect sense, but, of course, it was really the typical "random walk."

I went to Sarah Lawrence College in the late 1960s—it was wonderfully eclectic. I graduated in 1970. We were all going to pick some institution to change the world from, so education was mine. So I started out in education and moved into designing learning environments.



Lisa Kimball, GroupJazz

A kid had brought in a bird's nest. And she had it on her desk, and kids were gathered around and saying, "look at that, what's that? It's a string. How does it hold together?" They were doing what a group of people will do and asking questions. And what a good teacher will do is say, "well, how could we find that out?" But, instead, the teacher, clapped her hands and said, "OK, put that away, it's time for science!"

Interest in How People Learn

I started out teaching in experimental curriculum programs. I got a chance to be a pilot teacher for an incredible program designed by Jerome Bruner and others at Harvard at that time, called, at that time: "*Man: a Course of Study*," later to be called "*People: A Course of Study*." It was an anthropology program for Middle School. And it was fantastic! It was really about what I've now learned is experiential learning/collaborative learning. I got immersed. It taught me a lot about what it takes for people to have insights—even if they were 9-year olds. I got very interested in how people thought and learned.

Learning Is Experiential

What does it take for people to have insights?

I think they have to have a situation in which they're led to inquire. There was a famous paper by David Hawkins in 1965, called "[Messing About in Science](#)." The idea was that you took kids down to a stream and you gather things in jars, and that causes people to say: "why is that doing that?" "Why is that color in here and there's another color over there?" That's being led to inquire, which is what scientists actually do, rather than the way that science is often presented in school. Students think scientists are the people who know all the answers to science tests, when actually scientists are people who are looking for answers to things that nobody knows the answers to yet, which is a very different dynamic. That's what gets people excited and motivated and wanting to think about things.

How Does the Brain Work?

After learning about experiential learning in the context with kids, I was interested in trying to figure out how that connected to what anyone knew about how the brain worked and cognition. So I kept going back to school and learning more about cognitive development. I got a PhD in educa-

tional psychology and cognition and learning. I was trying to find out theoretically what people knew about how the brain developed and how people learned things.

What I learned turned out to be very aligned with the experience that I had teaching with kids and then, later, working with teachers. I kept escalating and moving up the scale because there were so many constraints on how people thought about schools. There were limitations on what you could do as a classroom teacher. So I got into teaching teachers.

Designing Learning Environments

I began working in Teacher Development; I figured maybe that's the place where you can make a difference. I worked with the Children's Museum in Boston and with Wheelock College's Teacher Resource Center.

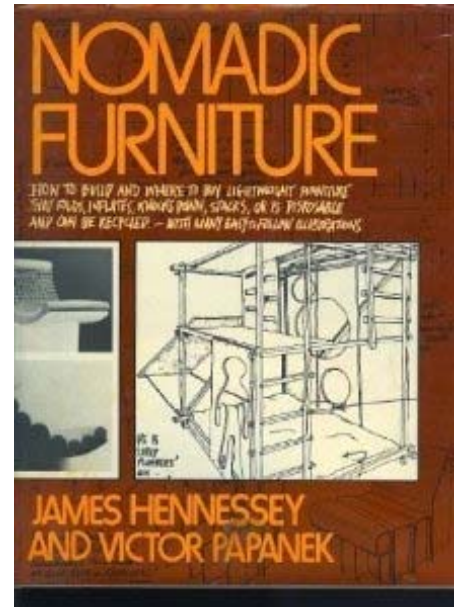
That happened to be an era when people were experimenting with helping teachers literally make their own furniture and learning tools because, in order to do experiential learning, you needed to have completely different workspaces. We had a great Resource Center where we'd go and get stuff that people were throwing away. One company would be throwing away pieces of rubber with holes cut out of them, and another company was throwing away the holes they'd cut out. These things would make fantastic classroom materials. You could make experiential math materials and so forth. Among other things we used were tri-wall cardboard and cable cores that telephone companies used, to make little tables and desks.

Empowering People to Use Tools to Create Learning Environments. In teaching teachers, most of whom were women, how to use power tools to make furniture, it had the same kind of empowering feeling that I noticed later when we started teaching people how to use PCs and that kind of technology. It felt very similar.

Why Is Group Discovery Important to Learning?

When you worked with kids and then teachers—were you focused on group learning and its impact on individual cognition all along?

It definitely had a group valence. What I kept feeling was that how people learned the most was interacting with the world and with other people. So, you get a group of 4th, 5th, and 6th grade kids together all looking at things and talking about them. One of my pet stories is from when I was supervising a student teacher in a classroom. A kid had brought in a bird's nest. And she had it on her desk, and kids were gathered around and saying, "look at that, what's that? It's a string. How does it hold together?" They were doing what a group of people will do and asking questions. And what a good teacher will do is say, "well, how could we find that out?" But, instead, the teacher, clapped her hands and said, "OK, put that away, it's time for science!"



Nomadic furniture was the book Lisa Kimball used to make classroom furniture out of triwall with jigsaws.

Prototyping & Learning: Give People Tangible Things to Poke At & Talk About. I love Michael Shrage's book, *Serious Play*¹. He talks about prototyping strategies. That's behind a lot of design thinking. He explains why having something that everyone can look at and mess with and talk about gets you farther than everybody just bloviating around a conference table.

That struck me as being from a similar theory base: It's the conversation you have about something that starts to develop the inquiry beyond what any of us would do on our own. You get a much richer thinking space that's created by the group. It doesn't matter whether they are 9-year olds or executives; it's the same thing.

I moved from the Boston area to Washington, D.C., when my fiancé got a job in Washington. At that time, I was doing stuff like helping to design playgrounds. I create learning environments. Now I use the complexity language, and I say, "I'm creating the conditions where people are likely to have experiences that would be developmental."

What Makes Senior Executives Good at What They Do?

When I got to D.C., I enrolled in another PhD program at Catholic University, working with Hans Furth, who was a student of Piaget's. I did a PhD project based on the Developmental Interaction point of view, which is still really the theory base of what I'm doing, which is basically that interacting with the world is how you learn stuff.

Besides working on the PhD, I had a piece of serendipitous luck: I ended up getting a job at what was then the Civil Service Commission (it became the Office of Personnel Management), right when they—during the Carter administration—were setting up the Senior Executive Service for the first time.

What is the Senior Executive Service?

It was modeled on the idea that the British had of a professional civil service—leadership-level people who are not political appointees. Until then, the U.S. Federal government hadn't had things that way. The idea was that you have these people, so we should think about how they're selected and how we support them.

I was on a team whose job was to figure out what it is that we need to do to select, train, appraise, support, and develop people for the Senior Executive Service.

Reflective Practice Strategy. This was my entrée into leadership development and executive education. What can you do to help people using Schön *reflective practice strategy* to help people become better at interacting with the complex problems that they have to interact with?



Photos: Weburbanist.com

Lisa Kimball still loves the spaces where kids play. She recommends [this website and article](#).

¹ "Serious Play: How the World's Best Companies Simulate to Innovate," by Michael Shrage, originally published in 1999, now available as a [Kindle eBook](#).

So that's how I got into the organizational development world. Donald Schön wrote a famous book: *Educating the Reflective Practitioner*², in which he posited that to teach people like doctors and lawyers— people who had to do something that had any sort of art and science to it—the best way to learn it was by doing it, but also by having reflective conversations, where somebody helps you think about, “Oh, so what happened then?” And, “Why did it happen that way? What else could have happened?” Really, it's by having experience and then, on top of that, having a way to reflect on and think about that experience. That's how you would grow in your ability to do anything that is hard and complex to do.

Interacting with Complex Systems is a Core Competency for Senior Executives. At the same time that I was working for the Senior Executive Service, I did a dissertation in “Systems Thinking in Senior Executives.” I was successful in showing that thinking of everything systemically (now I might talk about thinking of it as a complex system) is actually how our brains are wired. Because, if the world is a complex system, of course our brains would be optimized to interact with such a system.

So it's not a personality trait to think that way—to interact with complex systems. It's actually a construct. That means that some people may be better at it than others, or more precocious than others, but anyone can develop it more than they have.

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Successful Executives Had Three Key Capabilities

I was on this little team. One of the things you get to do when you work in government, you are allowed to do things you really have no business doing. It's kind of a meritocracy—a team can rise to the level of what you're able to do.

I got to interview high-performing senior executives all over government to try and find out what was it that they did that was different from other people. The reason I got to do that was that I was supposedly an expert in competency-based assessment.

Now, what I knew about competency-based assessment was that it was mostly a crock. But I didn't say that in my interview. I come from education, where that was kind of the big thing. In its pure form, it has some value, but it was being used in ways that didn't apply. Nevertheless, as a result of getting the job, I got to interview executives to find out what are the competencies associated with high performance.

So I got to interview these amazing people in all these different agencies and departments who would tell these incredible stories because we were using Critical Incident Interviews—which is part of the competency-process. It's another thing with its roots in the positive psychology tree. In that, you'd say, “So, tell me about a time you were really able to exercise the best in your leadership abilities.”... “Tell me the story.” And so they'd tell the story.” And you'd say, “How did you figure out how to do it that way? Who else did you involve? What happened next?” And so on, and so forth.

² [Educating the Reflective Practitioner: Toward a New Design for Teaching and Learning in the Professions](#), by Donald A. Schön, 1990.

After doing these interviews—there was a whole team of us doing tons and tons of these—we then looked at them to pull out what were the common competency or threads. We had six of them. The first three were:

1. **Ability to Understand Complex Adaptive Systems.** One of them was what we called *Systems Thinking*, which now I might call the ability to understand complex adaptive systems.
2. **Ability to Build Networks.** Another was *Building Networks*.
3. **Showcase Subordinates.** Another was part of a “human resources” cluster which included delegation, but these people weren’t paranoid about having people who worked for them get credit and visibility for things. In fact, they were always pushing other people forward to make the presentations and to do whatever it was they needed to do.

We found this clustering of capabilities—and that was back in the Carter administration—and they’re still using the same framework. So it has been validated after all this time.

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How to Identify Great Candidates

So, after you had identified and documented the framework, what happened next?

I got to do that, and it was really exciting. Then, since we had done that, we got to help agencies develop their programs and train both the senior executives they had, and we had something called the Senior Executive Candidate Network, which I invented. (I was very young, and I didn’t know any better that you couldn’t just do that sort of thing.) We said to the agencies: “you should identify the people you have who fit this profile and develop a pool of people who will be good candidates.”

Part of our real agenda there was to get more women and minorities—they were terribly under-represented. We were using a strategy that I called “stocking the pond.” We created a policy where you could fast-track hiring someone who had been in that pool. It incentivized people to pick people out of the pool. The pool was enriched with women and minorities because we were able to allow selection processes that could get more of them into this candidate program. It was clever, and it worked, to some extent, although women and minorities are still under-represented in our civil service.

Part of the thing was, of course, people pick people they’re familiar with. Part of the candidate program was that they got to do rotational assignments. The idea was that they’d be somewhere where somebody would get to know them and that they might hire them.

What you’re describing is something I’ve bumped into a lot of big companies. Did it originate with your work in the civil service?

I think, traditionally, most big organizations have had some talent development system, but the government didn’t. They had a Presidential Fellow program and an Intern program and the White House Fellows. So they had odds and ends, but, before the Carter Administration, they didn’t have a systematic approach to figure out how to build a leadership cadre.

Is Leadership Talent Fungible Across Disciplines? Where they might have been, in my opinion, slightly off track, is that this took place in an era where people assumed that this leadership executive role could be fungible between jobs. So, somebody could be a great leader over at the General Services Administration (GSA), and then you switch them over to the Energy Department. The notion was that there would be this cadre of senior executives who could be swapped around, without having the subject matter expertise. And that doesn't really work.

I think there were six of these competency clusters. You could have a seventh that was specific to the context of whatever it was. I think Sam Walton used to tell stories about the fact that the reason he was able to be successful at WalMart is that he really understood bobby pins. He had that kind of detailed understanding of something. So this notion of the generic manager is kind of bogus.

High-Performers Make Decisions Collaboratively

In my dissertation, I actually showed how this works. I had some people who were identified as high performers and others who weren't. It wasn't that they were labeled as "bad," they just weren't in the "super group." I had them do a task using "Think Aloud problem-solving." This is useful, because you can record their thought process and analyze the transcripts.

The problem I gave them was this:

"You have people spread out in multiple buildings. You are now going to be able to bring people together into a new building. How do you figure out how to organize the space?"

(That scenario happened all the time in government.) So, the people who were not in the high-performing group, tended to say:

"Well, first I'd get a matrix of all the people and their different jobs, and then you figure out the square foot per person, and then you'd figure out the space needed for conference rooms and other service areas, and you'd figure it from that."

They were all variations of the same approach.

However, pretty much to a person, the people in the high performing group said:

"First I'd bring everyone together, and we would talk about what is it we really need to do? And who needs to interact with whom in the course of the day? What kind of space would help us do that?"

The difference between the two groups was like night and day. It was so stark, I was afraid that people would think that I had faked the data! It was just another piece of evidence is the idea is that it's really all about who you involve in the conversation.

Next: Running an Organization for Professional Managers in Government

Then Reagan got elected, and my boss, Sam Phillips, who was a political appointee, left. I wasn't going to be soul mates with the new group coming in. Sam got a new job running a professional organization for senior executives in government. I called him to tell him I was still looking for a new job. He had just gotten an offer to run the executive leadership program for the city of New York. He said, "Well, I'm leaving here. And I haven't told the Board yet, I'll tell them that the bad news is that I'm leaving and the good news is that they should just hire you for this job."

It was great. That was a fun experience. I got to testify in Congress and do all of those sexy Washington things. It was the [Professional Managers Association](#). It wasn't a Union, but it was the

same idea. It represented all the Merit Pay Level Managers across government. Its mission was to promote their interests, but, partly because Sam, who was this amazing visionary and incredible person (how could you really have a boss after that?) had got them going on advocating for better management systems. So, they had been up to Congress testifying about the next new thing: Japanese management strategies and Quality Circles. “Why can’t we have systems that reinforce that kind of thing?” It was more than just “you should be paying us more,” although this was part of it, and there was this big merit pay system, which was, as they all are, completely backwards. For example, the pay system failed to recognize that most of the work wasn’t done by individuals. So I was trying to intervene in that.

DEVELOPING THE FIRST ONLINE COMMUNITY FOR THINKING TOGETHER

Online Think Tank

In 1983, I met this amazing guy called Frank Burns, who has since died. But he had been running the organizational effectiveness program for the Army at the same time that I was doing this leadership stuff for the civilian side of the government. He had developed a Think Tank, which was one of the first online communities, using an Amdahl computer at Wayne State University in Michigan. Since this was the early 80s, people were using Silent 700 printing terminals and acoustic couplers. But what was interesting was it had 300 to 400 people in this network, about one-third of whom weren’t in the Army. They were academics, and consultants, and people like Peter Vail (author of



Frank Burns

“[Managing as a Performing Art](#)” and “[Learning as a Way of Being](#)”), and Harrison Owen, and all kinds of cool people. When Burns was in the army, the task of this think tank was to scan everything that’s going on and figure out what the army should be paying attention to, which is a fun kind of a mission.

When Burns retired from the army, it was his belief that, of all the things this Think Tank had scanned, computer networking was going to be the powerful “change the game” thing. So he decided that, when he retired, he would start a company to make that technology, which was available in the Army, available to everybody. I joined him in that mission. And, of course, we thought it would take off any day because it was so important and powerful. Of course, at the time, it cost \$60/hour during the day to get online.



Harrison Owen,
Open Space Technology

Formed the Meta Network

The company was called Metasystems Design Group. And, Frank started the Meta Network, which, by the way, still exists. It’s actually the longest running continuous online community. (The Well is better known because it had more journalists on it.) At the time, in terms of clients you could earn money from, it was the Army, Exxon, and places like that, because it was expensive, and people had to have computers, which most people didn’t.

The Meta Network is an online community dedicated to learning and creative freedom. Founded in 1983, the goal was to make rich interaction possible beyond the limits of time and space. MetaNet continues to thrive as a haven of stimulating resources and conversation in an impersonal Internet. We share deeply held values of candor, curiosity, cooperation, and creativity. We hope you'll join us.

The Meta Network – dedicated to closing the gap between human potential and the human condition.

The Meta Network

Our Meta Story

We are at the beginning of extra-ordinary history. The technology of electronic networking has freed us from the tyranny of the formal hierarchy.

And we are now free to create new forms of purposeful human systems.

Not to replace existing structures.

But to transcend them.

And we not only have the capacity to electrify our networks.

I think we must.

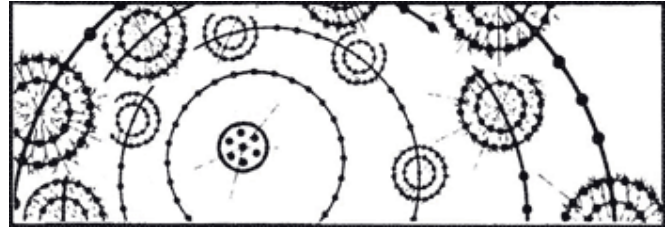
Given the state of affairs in most formal human structures, this is something that we had better do.

And one of the great ironies is that we'll actually be serving the very structures we'll transcend.

We'll be infusing them with new spirit.

Imagine the emergence of a new meta-culture.

Imagine all kinds of people everywhere getting committed to human excellence, getting committed to closing the gap between the human condition and the human potential.



Imagine a rapidly growing movement of “excellence activists” that runs into, through and amongst all kinds of existing organizations and human communities

And imagine all of us hooked up with a common high tech communications system.

That’s a vision that brings tears to the eyes.

Human excellence is an ideal that we can embed into every formal human structure on our planet.

And that’s really why we’re going to do this.

And that’s also why The Meta Network is a creation we can love.

And that may be the most important reason we should work together to make it happen.

~ Frank Burns, January 1983

From the original concept paper for The Meta Network

Frank Burns and Harrison Owen (and later Lisa Kimball) started cooking up a different way of meeting based on self-organization, real time agenda-building, and total engagement in the early 80s. The first symposium focused on “organization transformation” based on an “open space” design happened in 1983 and meetings haven’t been the same since. This was part of the beginning of general interest in ‘whole group’ methods (Open Space, Future Search, Real Time Strategic Change, etc.).

Early Days of PC Use. If you wanted to be a member, and you didn’t work for a big company, you had to buy a computer and dial into our network. (This was pre-commercial Internet.) So there were people who were buying their first computer just to be on the network. At that time, many people didn’t have any other reason to have a Personal Computer. In fact, I bought mine for that same reason—an IBM PC with a disc drive. I had to go to New York to buy a 1200 baud modem because there were none available in the DC area. I went to 47th Street Photo and got one, and Frank helped me install it. I also had to get another 64K of RAM in order to be able to run it. It was that level of

technology. Those are the years, when, if we travelled, we had to bring the kit that would let you unscrew the plate off the wall and put alligator clips into the phone connection for your acoustic coupler. That was the heady era of discovering online technology. I got very deeply into that for a while.

Supplemented Face-to-Face Meetings with Online Discussions for Follow Through

Both Frank and I were coming from the same place. We would facilitate offsite meetings for organizations with executives, and so forth, and they would be great. And then the half-life of what happened to all those intentions when people got back was very short. And, so, the idea was that if you put everybody on a network, you could rekindle the conversations. Let's say there were 20 people at the meeting, and they're now all hooked up on a network, you only need one of the 20 to contribute something that then boots up in the other 19's consciousness. The chances are that, over a period of time, one day it's one person who contributes, another day it's another person. But you get critical mass of continued reminders. And so you can maintain the momentum.

Are you saying that the key to keeping the momentum going is to rekindle the memory of the in-person experience?

Yes, the combination of that, and continuing the conversation. It's not exchanging information, not that that's bad, per se. Sometimes that's brand new information. But that's not what it's primarily about. It's about continuing the conversations that you started when you were together face-to-face. (One of the advantages we had in the early days was that the technology was so crude that it couldn't be about entertainment. You couldn't do e-commerce. You couldn't have a giant knowledge bank of best practices. You couldn't do any of that. The only thing you could do is talk to other people.)

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The Role of Entrainment: How to Foster High Quality Conversations

Coming back to the topic of neuro cognition: a lot of the time, because of the cost structure, a lot of the people would be online late at night. The dial-up costs went from \$60/hr during the day, to \$25 after 5 pm, to \$16 after 9 pm to \$6 after 11 pm. So, you're home at night, and when you sit down to communicate with your fellow online community members, you've gone to the bathroom, you've gotten your Diet Coke, you're kind of in the zone, where you are open to taking in the communication. And, if you want to get Neuro Linguistic Programming (NLP) about it, everybody's in more or less the same position. You're getting multi-sensory input, because most people, when they read something, they're hearing it. And their fingers are on the keyboard, and you're looking at the screen. So, from an NLP standpoint, you're basically in a little group that is basically entraining each other *à la* entrainment. You're *expecting* to have a quality interaction. And, if you're expecting to have a quality interaction because you're kind of in the mood for it, in the zone for it, the likelihood of having it is greater. Then you have it. So that reinforces that; it's a positive cycle. What would happen with these online groups is that they would get incredibly bonded and have very high quality conversations. We did that for years in all kinds of interesting ways and configurations.

It's interesting, that, as the technology improved out in the world, I think we sort of lost touch with this incredible core aspect of it back when everyone got all excited about everything the technology could do. Just recently, people seem to have figured out: "oh, it's about social connections!"

Use Appropriate Group Meeting Metaphors for Online Communities

As you're describing the entrainment experience, did we lose some of that quality as people switched from real-time to threaded, not real-time, conversations?

Our stuff was all asynchronous, so it was not real time. But we made heavy use of metaphor to reinforce the group experience. In those days, if I went to speak at a conference, I was often railing about how most of what was then called groupware software was really inappropriate because they were using the desktop metaphor. I would explain that describing my relationship with you as having access to the same file folder doesn't really feel like that's a relationship. It's completely wrong! The desktop is an individuated space. It's totally the wrong phrase.

We came up with metaphors depending on what the client was doing, so we had the "HP Hot Tub," the "Digital Equipment Woods Meetings," for our online community spaces. We wanted people to conjure up those feelings. We didn't want them to conjure up "which file drawer are we going to talk in?" That's all wrong. We did a lot of work with trying to help create the social dynamics online. Notice that, in all the education spaces, they have a "Blackboard" and a "Podium." These are all the things you're trying to get away from when you're designing a learning space.

CHANGING THE CONVERSATION CHANGES EVERYTHING

Impact Organizational Culture by Changing HOW People Have Conversations

Metasystems Design Group was kind of an Organizational Development consulting firm that had a specialty in virtual tools as well as in person tools. It was right in that time frame when that was the latest thing.

I continued to do that kind of consulting. And often people would say, "We need to hire you because we have a communication problem," and "We want to change our culture." My response would be, "Let's take an actual problem that's relevant to what you need to do and let's work on that in a different way, and, as a result of doing that, it's going to turn out that you're going to have an impact on communication and culture and all that other stuff, by not working on it directly."

It goes with my theory of action that changing the conversation changes everything. But you need something to be having the conversation about, rather than communication as an abstract topic. Throughout my career, it's really been about working with a client who has some actual thing they need to do. "Let's help you do that in a different way than how you usually go about doing that." So, instead of having "the launch" of a big huge initiative, let's not do that. Let's try to have these smaller, interesting, multiple things going on that have in common these differently structured ways of interacting. It gets at the power dynamic and all kinds of stuff, but you don't have to have that be the subject. They'll say, "The problem around here is that nobody feels empowered and nobody will say anything in a meeting because they're afraid the Head Doctor will diss them or will ruin their career." Let's not even have that discussion. Let's have the discussion about "what are we going to do about suicides?" Or what are we going to do about some other particular problem we're trying to solve, and let's have it in a group that includes people of different ranks. And let's have it in a way that creates a structure that doesn't allow the usual bullying stuff to happen. People will have an experience where they'll find out that's what was really useful and want to do it again. So you'll be working on that power/hierarchy issue without saying, "Today, we're going to work on the power/hierarchy issue," which would immediately generate the immune system of the organization against that.

CREATING STRUCTURES TO FOSTER GROUP INTERACTIONS

Why Do Jazz Ensembles Work?

Let's talk about some of the work you're doing now. I'm particularly interested in what you call "Liberating Structures" – a group of exercises that can be used in face-to-face meetings to create higher quality outcomes from the group. How and why did you decide to catalog structured approaches to group interactions?

It's all the same principles for doing the face-to-face stuff, which is what I'm doing a lot more of now: Sitting in a circle, being silent for a moment, doing these various kinds of different structured exercises, is, in fact getting people to tune in with each other. Which is why Jazz ensembles that are good are so good. Because that's what we need to do: we need to have those kinds of experiences that allow us to produce things that are better in that moment. And connect us in a way so that when we are no longer in that environment, we can conjure up part of that feeling and use it in order to be productive.



*Engaging Everyone with
Liberating Structures*

Lisa Kimball has collected many of the structures that work well in whole system meetings into a [handbook](#) which is available free of charge at www.groupjazz.com

Designing Great Structures to Support "Whole System" Meetings

I've been using these methodologies forever. I've been doing off-site retreats, executive learning sessions, all kinds of group meetings, and finding good ways to do them. I was always a methodology junkie, so I've always had my antennae out.

I happen to be friends with Harrison Owens, so I was part of the group that started inventing and doing Open Space. And, because my partner Frank Burns and MetaSystems knew everyone and was king of a guru in that space, and because he was very generous in letting me do whatever we were doing, I had a great apprenticeship opportunity to learn about all the stuff that he knew. I participated in the Organizational Development Network and that world.

I got to encounter everybody who was inventing—at that time, particularly in the 80s and the 90s—what people were calling "large group processes" or "whole system processes." People had kind of gotten this idea that having the whole system in the room was a good thing; rather than having the executive team on the fifth floor do the strategy, it was better to get the whole system in the room.

Most of those processes involved multi-day meetings. They had these wonderful methodologies. We all did them at different times.

But What Happened "Back at the Office?"

So, we had these great meetings, and people would be really excited about the quality of the interactions, but I was frustrated, because some people would get back to the office and have these same old terrible meetings and nothing would really change. So, maybe in the early days after the offsite, there would be a few little tweaks. But, in general, it didn't fundamentally change the structure of how work gets done in the organization unless you fundamentally change the structure of how work gets done. Everyone had a good time at the offsite, but, in some ways, it was almost a hypo-glycemic effect, where there's a sort of high off that experience, but then you get back to reality, and it's even more depressing than it was before realizing how bad most of the interactions are. And so, next time you try to get everyone all up for something, it's even harder because they say,

“Oh no, it’s going to be another one of those things where we have a great off site meeting and nothing happens.” That’s not good.

Can We Change the Way Work Gets Done Back at the Office, Too?

I was trying to figure out what could we do to actually have people change how they do what they do. So, for one thing, I started experimenting with making the structured meeting process a little more transparent. Then I started experimenting with making it more bite-size. The idea was: okay, we’ll have the great meeting for a day or two days, or whatever we’re doing. And we’ll use these different processes, but instead of trying to DO “IT,” we will use a lot of different interaction designs and be transparent about what they were, and see if we could make them easy for people to grab onto. Parallel to that, I’m interested in jazz and improv’s and simple rules-based things. So I thought we should have a similar thing for solving a problem or creating a new idea that we have for jamming a song or creating a little improv. What are those things like?

That’s where the framework of complexity science comes in:

“Simple rules create an infinite number of possible scenarios that all have a certain quality” is one of the principles. The idea that works in jazz and improv, and now with Liberating Structures, is that there are a few simple rules that are the constraints within which a group can talk about anything. So it’s not about content.

It’s also about making sure that people notice what those rules and constraints are and reflect on them. (*This is the transparency piece.*) Before, those of us who were good facilitators, we knew what they were. But that was kind of our “professional secret.” So I started experimenting with this notion of helping people notice how that process works as well as what content came out of it. And then having them explicitly talk about—and this goes way back to what you need to do with 5th graders—“So, where could *you* use this in what you do?” I couldn’t tell them that. But they could think about that for a minute. A perfectly good answer could be either “This could be useful with what I’m doing” or “I have no idea.” Some people will have an idea right away. For other people, it will simmer and then pop up another time.

The goal was: figuring out what we need to do so you change the meeting on Wed. afternoon in the fifth floor conference room, rather than have the greatest offsite meeting ever.

Now, having the great offsite is part of the learning process. So that gets back to this experiential learning thing. The notion is: If you’ve been in a session where you’ve used one of those processes for 45 minutes or an hour for an exercise, then you’ve had a couple of minutes to reflect on the exercise, (“How does that exercise work? What were the simple rules? How was this set up? How did that work? How might I be able to use it?”), your chances of actually trying it go way up. And you don’t need any further training. You’ve been trained. Now you go try it. And, if you do a process like

Liberating Structures

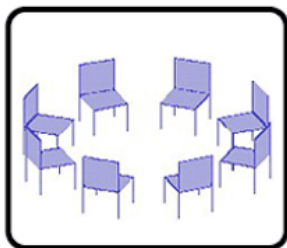


Jazz an example of simple rules that make up liberating structures. Frank Burns and I started talking about meeting design methods based on Liberating Structures in the early '90s.

that within an organization—let’s say you have a meeting with 60 people or 200 people at work, in a meeting like that, where everyone has had these experiences of these processes, and have had a chance to talk about them and to think about where they might apply—some number of those people will try it out in some other meeting in that organization. Some other people at that meeting are ones who participated in the first meeting. So, in a way, you’ve got some ringers built in. And you start getting critical mass. “Because if Patty did that, I guess I could try that in my meeting, because it didn’t look that hard, and nobody killed her.” You start changing the culture in the organization to having people think through, “Okay, I got people together around this table, how are we going to make this the kind of interaction we need to have.”

And you start noticing things, like, “Gosh, are the right people here? Maybe not?” So you start thinking about not only what’s going to happen during this hour, but to think about who needs to be invited to *be* in this hour. Then maybe you need to think about what’s going to happen after the hour. All these things that we OD types and leadership development people have a million PowerPoint slides about, you really want to get that into the reflection process which includes not just the manager but anybody else. There’s no reason a janitor can’t facilitate a good meeting.

DISCOVERY & ACTION DIALOGUES



Discovery & Action Dialogues (DADs) are conversations with participants designed to:

1. Engage everyone in short, lively conversations to discover the existing solutions they already know and to create new ideas to eliminate and prevent the target problem.
2. Identify volunteers among this group to experiment with solutions and ideas.
3. Provide the facilitators and participants the opportunity to listen to each other and identify barriers to action or change.

What do you know/think about _____?

What do YOU do about _____?

What keeps you from doing that all the time?

Who/Where have you seen overcome those barriers?

What other ideas do you have about removing barriers? (or supporting desired behavior)

What has to happen next to make that happen?

Who will do what when next?

The D&A Dialogue process is one developed as part of Plexus Institute's work with Positive Deviance that we applied to quality and safety problems in hospitals. You can find out more about this at <http://www.plexusinstitute.org> and at <http://www.positivedeviance.org>.

From *GroupJazz: Engaging Everyone with Liberating Structures*, p. 29

CHANGING THE CONVERSATIONS IN HEALTHCARE SYSTEMS

The Birth of Plexus Institute

A little more than 10 years ago, a group of people met at Mohawk Mountain House in Tarrytown in an Open Space-designed meeting to talk about chaos theory and complexity and organizations. These were all people, a lot of whom were in healthcare, who were interested in that. Out of that meeting came the idea that maybe there should be an organization that could bridge the gap between what was getting produced out of complexity theory and what people could actually use. So Plexus was born. I was involved with it early. I was on the board. I did the Executive Director role for a few years. Now I'm back doing some of the education and learning stuff, and, happily, someone else is talking to the accountants three times/week.

 Keith McCandless	 Henri Lipmanowicz	 Jeff Cohn
 Liz Rykert	 June Holley	 Dan Pesut
 Sharon Benjamin	 Judah Pollak	

Plexus uses Liberating Structures as the basis for its work ... It has been used extensively in work with hospitals to eradicate hospital acquired infections.

Plexus clients are mostly in healthcare, because our healthcare system is a big gnarly complex problem that could use some new thinking. We got a grant, for example, from Robert Wood Johnson to work with a network of six hospitals to pilot these methodologies to work on the MRSA Infection problem. (MRSA is short for Methicillin-Resistant Staphylococcus Aureus—MRSA—infection.)

Some Examples of Changing the Conversations from Healthcare:

One of the things that's big in healthcare is the whole arena of quality improvement and patient safety, which are all the things for which people do lean and six sigma, and various quality improvement processes to deal with things like infection transmission and the use of other checklist protocols.

So everybody's got those processes and checklists. The problem is that having a checklist doesn't change anyone's behavior. Even if they have a checklist, it doesn't speak to how we're going to make it possible for people to do what's on the checklist consistently.

Issue: SOME People Don't Comply With Recommended Practices. For example, we did a lot of work in hospitals on the transmission of MRSA Infections—it's a staph infection. They all know a lot about how to prevent it, number one of which is washing your hands. So it's not like you need somebody to do more research on what to do: Develop a checklist. But the problem is that there's often a really good reason why people don't do whatever it is. So for example, people said, "The problem is we can't get doctors to wear their gowns because those doctors have an attitude." People are always doing that, pushing it on the others. So the idea is "What if you have a conversation that has doctors and the other people in it?" Instead of saying, "How come you're such a jerk, and you don't wear your coat?," you're having a conversation that uses the Liberating Structure called "Discovery and Action dialogue." It's a little different way to ask a series of questions about a problem. Instead of saying, "How come you're still beating your wife?," you say, "What's in the way of wearing your gown all the time?" which has as an underlying assumption that you already know you're supposed to do it, and you're actually motivated to do it. But there's something in the way of doing it. It's not

about your bad personality. So the group can have that conversation and discover, well, “the gowns are hot.” “If I take my jacket off, there’s no place to put it. The whole point of the gowns is a barrier precaution, so if I put my jacket on the bed, that makes wearing the gown moot.” It turns out there’s a reason. It’s not being a slacker. Then there’s a whole bunch of nuanced ways that the people in the group can have the conversation.

People are then able to say, “What can we do to get around that problem? Has anybody already figured out a way?” “Well, yes, over in Wing 2, they put hooks outside the door and doctors can put their jackets on the hooks.” Our temptation then always is, “Oh, goody, we found a best practice! Let’s write it up. All we need to do is put hooks outside the door.” But it turns out that that might not work in the other wings for any number of reasons. What does travel is not the actual best practice of putting hooks outside the door; what travels is the process that enabled them to come up with the idea, which is having the conversation with everyone involved.

On another floor, instead of hooks, they use a closet. They figure out what’s appropriate locally. It’s not the 10 best practices but 1,000 local accommodations of the trick of getting it done. And, in order to find out what those are, everybody’s got to be in the conversation, including the people we call the “unusual suspects.” The person who has the good idea may not be a doctor or a nurse, but a technician. And the person who might have the closet idea might be the janitor. However, usually the janitors are not in an infection control discussion, because it’s thought not to be relevant to their job, despite the fact that it’s relevant to the bottom-line mission of the organization.

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Use Structured Conversations with Members of the Whole System. So, when they are in the conversation, you not only solve problems, but now they also know HOW to solve the next problem that we don’t even know about yet. It becomes solvable because you have people who know how to work on it. And you have people who feel that they have a connection to the bottom-line mission in the organization. So you get a janitor, who, when asked, what’s your job all about, will now include, “Well I have a role in keeping our patients from getting infections.” You can imagine all the productivity upsides there are by having more people in your organization thinking of themselves as accountable for that bottom-line mission.

The whole thing is driven by the conversation. It’s not driven by training.

The Case of the Small Gloves. In another case, there was a nurse who had small hands, so she wasn’t wearing gloves. She goes into the room, and they don’t have the small size, and she can’t use the bigger size. They keep the gloves in the closet down the hall, and they don’t have the key to the closet. If she doesn’t have the small size gloves and would have to get the key, and maybe they don’t have the small size gloves in the closet, and tick-tock, the time is going, and there’s a patient who needs attention. So then the hospital observes the fact that people aren’t wearing gloves, and they say, “I guess we need more training programs about gloves,” or “the posters that say, ‘wear your gloves’ need to have a different font size.” Or, “We need to tell everyone that if they’re caught three times not wearing their gloves, we’re going to dock their pay.” All of those things—none of which has anything to do with the actual problem, which is the glove supply.

So, over and over again, they think of the problem as a kind of engineering problem. In this hospital, while we were working, they had a big lean project and they’d done a huge supplies drill. They had spent lots of money creating a supply system where they put par levels (e.g., averages) of all the supplies everywhere. So, what you’re telling me is that you now have a system that is 100 percent reliable in having the wrong things everywhere all the time. Par would be half the time you have more

than you need, and half the time you don't have enough. It takes 30 seconds to have that conversation. And they had spent millions of dollars and had spent months with computer models. I tell this story when speaking to people in hospitals. And they can tell me hundreds of things like that that are going on every day. That's what happens when the right people aren't having the right conversations with one another.

That's my motivation for being a Process Jonny Appleseed. As smart and creative as I am, I can't go solve all the problems in all the organizations I might work with. Even all the consultants in all the world couldn't do that. But, if we could build capacity in organizations for them to solve their own problems, then we'd have something. And not only that, we'd have something that made people feel more whole and part of something, and respected, and all the other values. The janitor who feels his job is about infection control has a different view of himself than someone who thinks his job is mopping up shit on the floor.

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These are great examples. Do you have any where the patients are part of the conversation?

Yes, both patients and their families: At one of the Veterans Administration (VA) hospitals in Pittsburgh, one thing that emerged from one of the conversations in the group was that, "Patients see all these precaution signs outside their door, and they wonder what that means, and their families wonder what that means. And the doctor tells them in doctor. Speak, but they're afraid and concerned, and they don't really understand. So what could we do about that?" Part of the Discovery and Action dialogue protocol is: As soon as you say "They" in any context—they don't understand, or they don't do their jobs, they whatever, the next thing is: how could we get one of them in this conversation.

In that case, it was, "Well, let's talk to some visitors and some patients who have been around a while and see what they think." In the end, a group of family members ended up drafting a new flier explaining stuff in language they could understand, where patients had been put on precautions because of infection issues. They are part of the people in this little mini system. If you think of this complex, interconnected system, they need to be part of the conversation. Because only the people *in* the problem can ultimately solve it.

Results and Recognition

Plexus Institute got recognized by the CDC and other places as having gotten incredible results. They've reduced infection transmission as much as 90 percent for multiple years. So these are real bottom-line differences. Since then, we've received money from some other government agencies, and we've partnered with Indiana University that has some money to work on these problems that continue to use these methodologies in this context. And some hospitals have just hired Plexus themselves.

People who have been involved in some of our projects where they've had to design a new program or a wing have used some of these methodologies. Our goal, and my goal, is to have the people in these organizations doing it, not us doing it. I think we've been quite successful in installing the capacity. There are a number of places—Billings Clinic in Montana often wins a lot of awards for

being a cutting-edge hospital—that have done all kinds of things, a lot of which I don't even know. Einstein hospital in Philadelphia is another one that has been recognized. In another hospital where we instilled these practices, they said they were fully staffed with nurses for the first time since anyone could remember because the nurses were saying things like, “This is a place where people are interested in our opinions, I like working here.” We weren't really tracking that from an assessment point of view, but there is evidence that this stuff makes a difference, and the people in these institutions feel that it has fundamentally changed the culture.

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