

Appendix I

Checklist success factors and effects

These success factors and effects were derived from PhD research on Large Scale Interventions (Van der Zouwen, 2011).

Before the work meeting: check the preconditions

1. Is co-creation with stakeholders the right approach? Success factors:

- The task is important.
- Stakeholders need each other to succeed with this task.
- Complex, urgent, or uncertain situation.

2. Leaders are willing to support this process. Success factors:

- Leaders 'with an itch to scratch'..
- They are willing to collaborate, to share some power, leadership alignment is acquired.
- They are willing to spend time and money to do it properly.
- They enable people to participate and contribute.

3. Facilitators are skilled to conduct this process:

- They make a clear contract with the sponsor/client.
- They are aware of their own role.
- They are skilled to work with (large) groups in a hands-off mode.
- They themselves believe in the principles of co-creation with the whole system of stakeholders.

4. Contra-indications, do not use if:

- the issue is not really important to anyone;
- individual professionals can solve the problem;
- one-way communication of information or confidentiality is required;
- there is no room for change due to lack of resources, energy, time; or if there is no real influence
- the situation is highly political and lacks any will to cooperate;
- an important group of stakeholders cannot or will not participate.

5. Contra-indications for the the facilitator

- Facilitators want to 'sell' co-creation.
- Facilitators use abstract jargon; they do not try to connect with what the client needs and wants.
- Facilitators choose an expert role; they believe they have the right answers.

How to use co-creation in meetings for whole system change

6. Success factors for effectively designing and performing the change process

- The work meeting is planned as part of a larger participatory process.
- Co-design of the process with stakeholders; work with a design team with a representation of stakeholders for all essential decisions regarding design, management and logistics.
- The format of the working session is tailored to the context, task, relationships and directions.
- Participants:
 - Getting the right people in the room;
 - The invitation process creates engagement, supported by a compelling purpose title.

7. The meeting is managed well. Success factors:

- The right people are in the room, a cross section of the whole system of stakeholders.
- Caring for those who are not present; contacting is supported by the wider social system.
- The design enables everyone's contribution through inclusiveness and building trust; focuses on the diversity of participants' qualities, caring for whole people rather than roles
- Divergence of perspectives: interactive exploration of dynamics in the system regarding the issue, exploring the whole before fixing any parts, engaging new connections, building a shared frame of reference.
- Leadership is distributed by self-management of subgroups and shared responsibility for results.
- Convergence of perspectives: Focus on common ground and future action.
- Conflicts are clarified and acknowledged, not resolved.
- Meeting room and setting facilitate the process; they symbolize the principles of co-creation.
- Meeting is managed well by facilitators, in a hands-off mode.
- Reporting is done in real time, for anyone to see at any time.
- Action planning, in the form of appropriate follow-up, takes place before or during the meeting or immediately afterwards.

8. Reported effects

- Increased awareness and understanding of the system and context.
- Commitment and energy for change.
- Better implementation.
- New relationships, a feeling of connectedness, more potential for innovation.
- New structures sustain ongoing participation in an emergent development process.
- Communication is more direct and constructive.
- Capacity building, developing bricolage for dealing with complex issues, participants learn how to work from a whole system change mindset.