CO-CREATION

in work meetings

Making the invisible visible

Tonnie van der Zouwen

Heart Media

Content

Invitation to the reader and acknowledgements 7

Part I.
Practical theory: Principles and instructions for use 9

Chapter 1. Introduction and instructions for use 11
Who this book is for 11
Co-creation in work meetings, change processes and action research 11
A transactional object makes the invisible visible 12
'Hands-off' philosophy of managing 17
Reading guide 17

Chapter 2. When to use co-creation in work meetings? 19
The issue is important and complex, it is worth the effort 19
The circumstances must be right 21
Key chapter points 23

Chapter 3. What is a transactional object and what does it do? 25
Transitional, transformational, transactional? 25
Making the invisible visible; embodied and inclusive 26
Connectedness, innovation, trust 29
Both product and process 30
Capacity building, developing bricolage 31
Key chapter points 31

Chapter 4. Guiding principles ... 33
Holistic world view:
everything is connected in one undivided whole ... 33
The four basic principles ... 34
Systems thinking: placing the issue in its context ... 36
Active participation and self-management of stakeholders ... 37
Action learning ... 39
Sensemaking: searching for new meanings
with head, heart, hands and soul ... 41
Key chapter points ... 45

Chapter 5. Putting the principles into practice ... 47
You cannot do it alone and you don't have to ... 47
Division of roles in the larger change process ... 48
Position work meetings in the context of the larger change process ... 50
A cyclical change process ... 50
Forming a design team ... 52

Method 1. Process design using a large timeline ... 54
Create a proposal for the design of the work meeting(s) ... 69
After the work meeting with stakeholders ... 72
Key chapter points ... 72

Chapter 6. Do's-and-don'ts as facilitator ... 73
Let participants be responsible for the content and action ... 73
When do you intervene? Dealing with space invaders ... 74
Overview of Do's and Don'ts ... 77
Working interculturally ... 80
If you work online ... 80
After the meeting ... 81
Finally: master the art of hands-off leadership ... 81

Part II.
Methods to make the invisible visible ... 83

Chapter 7. Selecting a method ... 85
Selection criteria ... 85
Structure of the method description ... 88

Method 2. Timelines for exploring the past ... 91
Method 3. Timeline to collect objects ... 99
Method 4. Collective mindmap ... 103
Method 5. Glad-Sad-Mad overview ... 109
Method 6. Images of the Future ... 117
Method 7. Overviews of Hopes & Fears and images of the future ... 125
Method 8. Landscape map ... 133
Method 9. Large tables with results from previous research ... 141
Method 10. Geographic map of relationships or actions ... 151
Method 11. Collective agenda overview, a time-place matrix ... 157
Method 12. News wall with results ... 169

References ... 175
About the author ... 179

Appendix 1. Checklist success factors and effects ... 181
Appendix 2. Ten principles for leading meetings that matter ... 185
Appendix 3. Poster self-management leadership roles ... 189

Invitation to the reader and acknowledgements

'If your problem concerns me, may I be involved in addressing the problem?' This theme began playing an increasingly bigger role in my career as consultant, facilitator and researcher. Finally, I found a change approach focussing on work conferences involving the whole system of stakeholders, the Large Scale Intervention approach (LSI). People come to these work conferences because they consider a particular issue important. They are looking together at what is going on and what they can do to improve the practice.

In 2011 I received my doctorate on making a practical guide for the LSI approach. When is that approach appropriate? How do you do it well? What does it lead to? Developing ownership of the next steps seems to be an important success factor. Ownership emerges, for example, when participants in the work conferences jointly create overviews of what they know, think and want. Everyone becomes responsible for the outcome of the meeting. Jointly creating overviews, the process of co-creation itself, also affects people.

I notice that people consider engagement and ownership important but do not really know how to promote them. Many meetings are still being organised in which participants may engage by responding to questions or plans proposed by consultants or researchers. The latter take the outcomes away, draw the conclusions and write another report. This can be done differently, by exploring on site together what our past experiences are regarding the issue, what we feel about it now, where we want to end up and how we can address it. This is neither top-down nor bottom-up, it is co-creation. The formal leaders set the boundaries of the playing field and participate themselves in the meeting. I consider this book important because I think that it can save a lot of frustration, time and money and contribute to addressing the complex issues of our time.

In the past years I have noticed that co-creation of overviews even in work meetings with small groups of around 5 participants helps to develop ownership of the follow-up. In addition, it fits excellently in action research, in which you search for a better way together with the stakeholders and develop and share new knowledge. In 2022 the second edition of my book on action research appeared, which has just one section on work meetings. I was inspired to devote a whole book on how to make small or large work meetings more productive by searching and harvesting together through co-creation of overviews. One thing led to another, and now I have the pleasure to invite you to profit from the results of this writing process.

This book presents a wide range of methods and examples from my own practice. I invite you to use your imagination and utilise this book as bricoleur, as creative artist, to discover while doing so how you can adjust items to your skill set and situation. At the same time, it is important to keep to a few basic principles that ensure productive change.

I stand on the shoulders of giants. Grateful thanks go in particular to Marvin Weisbord, Sandra Janoff, Harrison Owen and Jac Geurts. Both my practice and this book lean heavily on their work and leadership. I thank Tova Averbuch for her inspiration and for being my travel companion in finding and sharing wisdom. I thank Gervase Bushe and Bob Marshak for their suggestions about this book.

I thank my colleagues Eva van der Fluit, Sander Vrugt van Keulen, Jan-Dirk den Breejen and Sicco van der Sluis, as co-facilitators in several practical examples in this book. Finally, my gratitude extends to all of the clients and participants in the projects I was privileged to facilitate. You will get to know some of them better by reading their experiences in the practical examples.

Tonnie van der Zouwen, Rosmalen, September 2024.

Part II

Methods to make the invisible visible

Chapter 7
Selecting a method

Selection criteria

Aside from large overviews, there are many more methods of making the invisible visible. What about building something with Lego©, dance, theatre, sets of cards. For this book, I chose transactional objects in the form of large overviews based on my personal experience and made a selection according to the following criteria:

1. They have the potential to produce a change in the whole system when addressing complex problems, they summarise the complexity, lead to breakthroughs by expressing a range of perspectives, generate new stories and encourage ownership for action.
2. They are rather easy to master and deliver good results if they are properly staged.
3. They can be used in either small meetings (5 to 20 participants) or large ones (20 to 100+).
4. They are intended as part of a customised design for work meetings lasting from one hour to several days.

Roughly speaking, there are two categories of transactional overviews: ones created in a subgroup and then collected in one overview or exhibition for further interpretation, or an overview that is collectively created directly in a plenary meeting, like the long timelines.

For all of the methods in this book, the following applies:

- they lead to an integrated overview;
- they support both divergence and convergence. First, information about the different interests is collected during the work meeting (divergence) and later integrated and interpreted (convergence);
- they are all *high touch*, made by hand or physically expressed by the participants;
- the facilitator works in a hands-off mode; participants do the collecting, analysing, interpreting and concluding themselves.

You can of course choose more ‘ready-made’ formats for large-group conferences, like Future Search (Weisbord & Janoff, 2010) or Open Space Technology (Owen, 2021). They utilise one or more transactional overviews and provide instructions for that. This book focuses on methods for making transactional overviews that can also be incorporated in a *customised* design, based on the underlying principles of Chapter 4. Table 3 presents an overview of the methods selected for this book and the goals you can employ them for in a work meeting. Method 1 ‘Timeline for process design’ has already been described in Chapter 5. Methods 2 through 12 are described in the rest of Part II.

Sometimes it is handy for participants to have a worksheet with instructions for the assignment. There are examples of worksheets available on the website https://www.tonnievanderzouwen.nl/en/worksheets/. You can download the worksheets from there and adjust the wording and design as needed for your participants.

Table 3. Overview and goals of methods for transactional objects

Transactional object	Goals						
	Design	Connec-ting to the issue	Exploring the past	Exploring the present	Exploring the future	Action planning	Evaluation
1. Timeline for process design (see Chapter 5)	X						
2. Timelines history		X	X				
3. Timelines with overviews		X	X	X			
4. Mindmap	X			X			
5. GladSadMad overview with sticky notes		X	X	X			X
6. Images of the future					X		
7. Overview of 'hopes and fears' stories combined with images of the future	X			X	X		
8. Landscape map			X	X	X	X	X
9. Large tables				X		X	X
10. Geographic map		X		X		X	
11. Agenda matrix		X				X	
12. Marketplace						X	X

Structure of the method description

The following chapters cover 11 methods for co-creation in a work meeting using a transactional object.

Each description follows the pattern:

GENERAL DESCRIPTION
of the method and the transactional overview.

WHEN TO USE IT
goal, number of participants, duration.

PREPARATION
room setup and materials.

ACTION
step by step guide with one or more examples.

REFLECTION
reflection on the underlying principles.

I have chosen to illustrate the methods with photos because a picture is worth more than a thousand words. Examine the photos closely and think about the message they communicate about the atmosphere, activities and the form of the overview – even when printed in black & white and not all the lettering being legible. For privacy reasons, all of the contributions have been anonymised and the people in the images made unrecognisable.

In many work meetings, more than one transactional overview is used, for different goals, like:

- Exploring the past: where do we come from, how did we get here with regard to the main issue?
- Exploring the present: what is the situation now? How do we feel about it? What are the current dynamics?
- Exploring the future: what does a desirable and feasible future look like?
- Action planning: how can we improve our practice with regard to the issue in question?

Adjust the method to your needs and possibilities, create your own version, but follow the principles as the guideline. The better the principles and working elements in Figure 6 are utilised, the more effective the meeting will be (Van der Zouwen, 2011).

Method 2

Timelines for exploring the past

GENERAL DESCRIPTION

Participants work directly on three long timelines on the wall to explore the context of an issue over time and in its environment as the basis for future action. The timelines display the history of the main issue, the history of the broader context of the world, and the history of the local, personal context. Participants develop stories and patterns and build a shared frame of reference of the past together. The focus on the past through the use of timelines quickly supports a community feeling because people see the world through each other's eyes. The timelines can also support letting go of the past by acknowledging what happened and how people feel about that. For example, if the past was turbulent or sad, a grief process may be needed before reform is possible (Owen, 2021).
Source: Future Search (Weisbord & Janoff, 2010).

WHEN TO USE IT

- At the start of a change or learning process, to explore the history of an issue in its context, to create awareness of the dynamics and developments in the system.
- Use this method at the start of a work meeting, to explore a range of perspectives, and to connect people to the issue in question.

Number of participants: 5 to 100.
Duration: 1 to 2.5 hours.

PREPARATION

- Take three long strips of paper (plotter paper, wallpaper, kraft paper). Adjust the length of the timelines to the size of the group: for 80 people you need three strips of around 8 m long and 60 cm wide; for a group of 5 to 20 people, use three strips about 4 m long.
- Put a time scale on the timelines. The time scale has been discussed with the design team: how far back do we need to go, is more space needed for recent years or not. Draw the time scale the same on all three timelines so later they can be positioned one above the other; it is easiest to do this on the floor before sticking the timelines to the walls.
- Stick the three timelines to the wall, at different places in the room, at eye height (if the group is smaller than 10 people, you can put the three strips one above the other in the same spot). Use long pieces of sturdy and wide masking tape, or the stronger (and more expensive) linen event tape, so the timelines do not fall down.
- Write the title of each timeline large enough to be legible from a distance. Frame the titles to emphasise them: one timeline for important events in each participant's personal development called 'PERSONAL HISTORY', one timeline for important events or periods in the history of the main issue in question, called 'HISTORY OF…', one timeline for developments in the world history/context of the issue called 'WORLD HISTORY'.
- Put enough marker pens under each timeline so everyone can work on them at the same time.
- Place four flipchart stands ready with marker pens or twice as many for groups greater than 40 participants.
- Make sure there is sufficient free space to work in front of each timeline.

ACTION

STEP 1: Individually completing the three timelines
(20 - 60 minutes)

State what the goal of making the timelines is:

– Forming a common picture of the history of the main issue.
– Placing the issue in the greater context of the world and the smaller personal context.
– Exploring the diversity of perspectives brought by the participants to the meeting.

Then give work instructions – verbally, and if necessary, also projected on a screen and/or printed on a worksheet for participants. Invite every participant to write crucial information on each of the three timelines, which represent their personal life, world events and the main issue. Take your time until… (around 20 to 60 minutes for all of the timelines together); then invite everyone to move onto the next step, assigning meaning to the timelines. See also Example 1 for work instructions.

Figure 14. The participants hang the three timelines one above the other

STEP 2: Exploring the stories of the timelines in subgroups
(20 - 40 minutes)

Ask a few participants to hang the timelines one above the other in one place (do not do this yourself, these are their timelines): the timeline with the history of the main issue in the middle, the world timeline above it and the personal one underneath. Then assemble the entire group in front of the timelines. Often the timelines look quite messy, and the participants are wondering how they can make sense of this mess. We do this in subgroups. Ask the participants to form four subgroups: one for each timeline and one for the connections between the three timelines. Everyone can choose their preferred subgroup; ask them to ensure that every timeline has at least one subgroup. In my experience, it works better if the small groups have no more than ten members. With large groups, form two subgroups per timeline.

Each subgroup takes 20 to 30 minutes to create a story about their timeline: 'What do you see, what conclusions can you draw? Tell a story about the people in this room / about the history of... / about our recent history in the context of... What are the implications for the work that we do?'

Ask each subgroup to assign the leadership roles for self-management: discussion leader, timekeeper, recorder, reporter. Pass out a worksheet with the roles for self-management or hang the roles on a poster on the wall (see Appendix 3). Each group prepares a presentation lasting at most 3 minutes. The presentation begins at … o'clock.

STEP 3: Plenary presentation of the small groups' stories
(15 - 30 minutes)

Each subgroup presents its story to the entire group in at most 3 minutes. Ask someone to be the timekeeper! Applaud when the time is up and give the floor to the next presentation. Once the presentations are finished, ask the participants to hang their reports on the wall so everyone can see them.

STEP 4: Plenary dialogue (10 - 15 minutes)
'Looking back at the stories, what can we perceive to be the common thread, the most important implication for the following steps? What have we heard and seen?' Ask participants to raise their hand if they want to share an insight. Ask someone to write down the remarks on flip-chart sheets. When they are finished, ask for the flip-chart sheets to be hung with the timelines.

EXAMPLE 7. Collaboration for a sustainable curriculum, leaving a difficult past behind

At the start of a one-day conference for a university of applied sciences, we explored the past of the main theme 'Collaboration for a sustainable curriculum'. In a large auditorium, normally used for exams, 80 people gathered. They represented the different teachers, managers, support personnel and students of the three different tertiary economics education programmes. There were three long timelines on the wall, at three different places. The participants sat around tables in mixed groups of 6 to 8 people.

After a short welcome speech and introduction by the director of one of the educational programmes, two facilitators explained the way of working and the conference programme. The conference programme consisted of four work rounds: exploring the past, the present, the future and planning for next steps. Then the people started on the first round, exploring the past using the timelines. The instructions were given verbally and also projected on a screen. Each participant filled in crucial events on the timelines; they were asked to indicate what they were proud of or regretted by adding a + or – to their items on the timelines.

Then they formed subgroups to make sense of the timelines and create meaningful stories about the past. They presented their stories in the large group and drew conclusions in the plenary session. Participants raised their hand if they wanted to add something. Then they were handed the microphone and

expressed their conclusion. A facilitator typed the conclusions directly into a slide presentation that was projected on a large screen, so everyone could see them and correct them. The facilitator asked if the noted formulation was correct.
What became evident were the many changes in the Executive Board and the top management because of much negative publicity about fraud in one of the studies. All the studies suffered under this negative publicity, even those with a high national ranking. Quotation: ‘Many things happened that we regret deeply. It’s not surprising really that everyone withdrew into their own world within the organisation.’ When the facilitators proposed later in the process to use the timelines again, they answered, ‘We can let the past go now. Let’s move on and focus on the future.’

EXAMPLE 8. **Strategy planning for a metal company**

Timelines for exploring the past can also be used as input for strategy development. A mid-sized company that constructs metal slider systems for a wide range of industries wanted to become a high-performance organisation. They had already done a high-performance scan, in which most of the employees were involved. Now they wanted to develop their strategy jointly for the coming years.

In a 3-hour workshop, the management team and a representation of employees met in a design space with a large whiteboard, 6 m long. The facilitator had drawn two time-lines on the whiteboard: one for the history of the company and one for the developments in the world. The timelines extended from the founding of the company 180 years ago to 10 years into the future.

The facilitator asked the participants to fill in both timelines with crucial events and results. A lively discussion arose in front of the whiteboard. ‘Do you remember when…?’, ‘What happened after…?’, ‘Now that you mention it, it reminds me of…’

Figure 15. Participants fill in the two timelines on a long whiteboard and discuss the events

Next, they interpreted the timelines together, producing a shared vision of their company. Then they took the conclusions and outcomes from the high-performance scan to create a *causal loop diagram*, a new model of patterns that links together the most important factors for strategic change. With this model, different choices can be tried out by deciding which knobs you could and would want to turn.

Example 1 in Chapter 1 also gives an example of working with timelines.

REFLECTION

Timelines – or any transactional overview – do not work well if the participants do not feel engaged in the issue. Perhaps the issue is too abstract, not important for them, or not formulated in a challenging way. This is expressed as a slow start, little conversation between participants while working on the timelines, confusion over what to add, few elements on the timeline. An overly homogenous group of participants will also lead to less rich conversations and a less rich image. In the case of the metal company in Example 8, only internal stakeholder groups participated. This is not ideal, but there was a range of functions and levels represented. You can envisage such a meeting as a meeting of the design team, after which more stakeholder groups can be involved somehow.

The timeline must be relevant for the participants. I experienced this in two similar workshops that produced very different results. Both workshops were introductions to action research. In one workshop, the participants were students, lecturers and researchers. Assuming that every participant had experience with learning, I proposed this main question: 'What is your experience with *action learning*, learning by doing?' The group approved it. Participants shared their experiences while writing and drawing on the timelines. That went well, as planned. In the other workshop, there were only students attending. We could not find a main question with a shared history. I proposed again working with the question: 'What is your experience with action learning?', but this proved to be too abstract, not challenging enough. In the first meeting, the lecturers and researchers started by sharing their experiences; this helped the students to understand that they also had interesting learning experiences to share. For the students in the second meeting, the subject stayed too abstract through the lack of interaction with other participants with other perspectives and experiences.

Timelines work best when the participants feel that the issue in question is interesting for them to explore. The interest is aroused by the formulation of the main question, and by the energy of working with people with different experiences. The two work meetings in this example were 'standalone' training sessions. In a workshop to change the whole system, the tone is set in the design team when preparing the invitation.

If the setting is staged well, the ownership of the timelines is high, also due to the high level of embodiment. The large – often messy – overview is created by the participants themselves, by writing and drawing on the timelines, by moving between the timelines, by meeting other participants on the way, by telling how they feel about events. Timelines work well when processing negative events in the past. Participants realise how much has happened, begin to see patterns, become aware that they are not alone. In his book, *Wave Rider*, Harrison Owen (2008) describes a model for 'grief processing' with the stages 'rage, denial, despair, open space and renewal'. Grieving about endings and death is essential for renewal, we have to let go and make space for new possibilities.

About the author

Dr Tonnie van der Zouwen MCM (Master of Change Management) is an independent consultant and emeritus professor at Avans University of Applied Sciences. She specialises in working with the whole system of stakeholders to find out together how to do things better. Tonnie writes books about this, facilitates co-creative change trajectories and provides training in co-creation and action research for teachers, consultants, professionals and researchers in government, hospitals, colleges and universities. She is recognised in international networks as an expert in the effective use of Large Scale Interventions, an approach to co-creating sustainable change in large group work conferences. She bridges the gap between theoretical knowledge and practical experience, and between organisations and challenging issues in society.

Tonnie owns a Masters in Ecology and in Change Management and a PhD in Management and Organisation Studies. She loves cats, plays the piano and is a mother and grandmother to a large family.
More information and contact details at www.tonnievanderzouwen.nl

See the website
https://www.tonnievanderzouwen.nl/en/worksheets/.
to download worksheets with instructions for participants, when applying the methods to make the invisible visible.

Heart Media Group

As a publisher, Heart Media is part of the Heart Media Group. Our core values are to connect, trust and renew. This is why we publish books in the fields of personal development, awareness, human change processes, organisational and leadership development. We care not only about the books we publish, but also about the authors who are passionate about sharing their message.

The book 'Co-creation in work meetings, making the invisible visible' is part of the series 'Change strategies for unlocking human potential in organisations and society'.

Other examples of books we have published include the Dutch translations of:

- The Surprising Power of Liberating Structures. Simple Rules to Unleash a Culture of Innovation, by Keith McCandless and Henri Lipmanowicz
- Appreciative Inquiry. A Positive Revolution in Change, by David L. Cooperrider and Diana Whitney
- Open Space. A User's Guide, 3rd Edition, by Harrison Owen
- The World Café. Shaping Our Futures Through Conversations That matter by Juanita Brown with David Isaacs

Heart Media

Heart Media Groep B.V.
Ockhuizerweg 16b
3455 RW Haarzuilens
The Netherlands

www.heartmedia.nl
contact@heartmedia.nl
T: +31 (0)30-6770859