CO-CREATION
in work meetings

Making the invisible visible

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Heart Media

Inhoud

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 I

Practical theory:

Principles and instructions for use

Chapter 1

Introduction and instructions for use

'Plan your harvest, not your session'
(Chris Corrigan)

Who this book is for

This book is meant for everyone involved in complex issues. Consultants, facilitators, prospective and current professionals, researchers, leaders. Many people are involved in complex issues, like developing a flexible organisation, creating ownership of continuous innovation, improving the well-being of a community. You need each other for success, which demands collaboration across the boundaries of disciplines, departments and organisations. You can't address these issues with a top-down or planned change process because no one knows exactly what is best to do, and there is no group of experts who can resolve it. Stakeholders can only explore it together through trial and error. This collective inquiry occurs primarily in work meetings.

Co-creation in work meetings, change processes and action research

This book covers how to explore issues with stakeholders in work meetings and harvest the rewards by creating something together. For complex issues, a work meeting is always part of a larger change process. If in addition you want to develop new knowledge and share it with a wider public, then that is a form of action research. You could consider this book as an elaboration of section 8.6 from the book *Actieonderzoek doen* (Van der Zouwen, 2022). People participate in a work meeting because they consider the issue concerned to be important. They share their knowledge, experience and perspectives. They create images of a desired future and explore possibilities for experiments to improve the practice or learn from earlier experiments.

Jointly producing large overviews of results plays an important role in this. Co-creation of these overviews accomplishes much more than just bundling results and making them visible. People change their focus from meeting together and discussing to creating something together, from talking about collaboration to starting to collaborate. I have therefore labelled the overviews 'transactional objects'. A term that is probably still unknown but will soon be explained in the next sections.

A transactional object makes the invisible visible

A transactional object is a large overview. It can take the form of a large piece of paper on the wall (or digital), or a collection of objects that form a whole. It is comparable to doing a jigsaw puzzle. Each participant has pieces of it, sometimes even unknowingly. Collectively the puzzle is put together, without a picture to follow. The more diverse the participants, the richer the image will become. It helps people to imagine what they are working on (Bird, 2018), to see 'the writing on the wall' (Ewenstein & Whyte, 2009). By interpreting the overview together, new insights arise, and new possibilities occur. Making something together is often fun and generates energy.

The results of a work meeting can be tangible, like prototypes for experiments, ideas for a process or product, action plans or new images of the future. They can also be intangible, for example strengthening relationships, a feeling of belonging, important personal insights, changes in awareness, new relationships, inspiration, energy, engagement and ownership (Gleirscher et al., 2016; Nissén & Corrigan, 2020). Example 1 gives an idea of how to make a transactional overview and what it yields. It concerns the use of long timelines to collectively make sense of the past.

EXAMPLE 1. A work meeting to develop the Centre of Expertise Sustainable Business (Part I)

Creating timelines to explore the past

On an afternoon in 2015, 48 stakeholders of the Centre of Expertise Sustainable Business gathered in a hall in a university of applied sciences. The centre had just been established and wanted to promote sustainable business, together with a range of stakeholders. It was not yet clear what this Centre of Expertise could look like and how effective collaboration with the different stakeholders of the Centre could be developed. The aim of the meeting was to develop an attractive and fruitful image of the future and to initiate the collaboration with internal and external stakeholder groups. This image of the future and the possibilities for further development would be shared six months later in different work meetings, during a kick-off event with around 600 attendees.

The participants represented the executive board, professors, lecturers-researchers, business partners, students, experts from other expertise centres, advisors and management assistants. The meeting was prepared by a design team of four representatives from the various stakeholder groups.

The director opened the meeting, explained the aim and stressed the importance of everyone's contribution. He clarified what had already been decided and set the boundaries of the playing field. Then facilitator Tonnie explained the way of working. 'We shall be working interactively in three rounds. First, we explore the past and the present, then we create images of a desirable and feasible future, and finally we collect a number of concrete actions for next steps.'

Tonnie provided instructions for the first round: exploring the past. 'How did we get here? How did this centre get established? What is the context of this development, both on the individual level and in the broader global context? Looking at the walls, you can see three 7m timelines. They are currently empty, there is only a time scale and a title on them. On the floor under the timelines, there are many marker pens. Everyone is invited to write or draw crucial moments or periods on all three timelines. Do this individually, but you are allowed to exchange information.'

At first, the highest-status people hesitate. Will it feel good to do this? Once they see trusted colleagues taking a shot, they also participate. Lively discussions arise among the people standing in front of a timeline. You hear for example: 'When did this whole idea actually start? Really, so long ago? Do you remember what we produced during the initial meetings? What happened after that? When exactly was…?' The personal timeline makes people aware of important moments in their personal life and what is worth mentioning here. 'Hey, our children were born in the same year!' or 'Funny, we are all writing about our education'.

Figure 1. Every participant writes or draws crucial information on the timelines

After half an hour, the timelines are filled with a chaos of details. Then the timelines are placed one above the other. This gives an impression of the complexity the centre will have to deal with. How can we draw wisdom from this mess? Tonnie invites the entire group to stand in front of the timelines. She asks the participants to form four subgroups: one for each of the timelines and one for the connections between the timelines. Each subgroup is asked to look closely at what it sees, to interpret what it sees, and to compose a story about it that is meaningful to them. What does this timeline tell us? What patterns do we see? Each subgroup writes its story down on a flipchart, a story from the past that is linked to the issue at stake and to the purpose of the process. They also prepare a presentation to share this story in the plenary session, in at most 3 minutes. Once the subgroups are ready, the presentations begin.

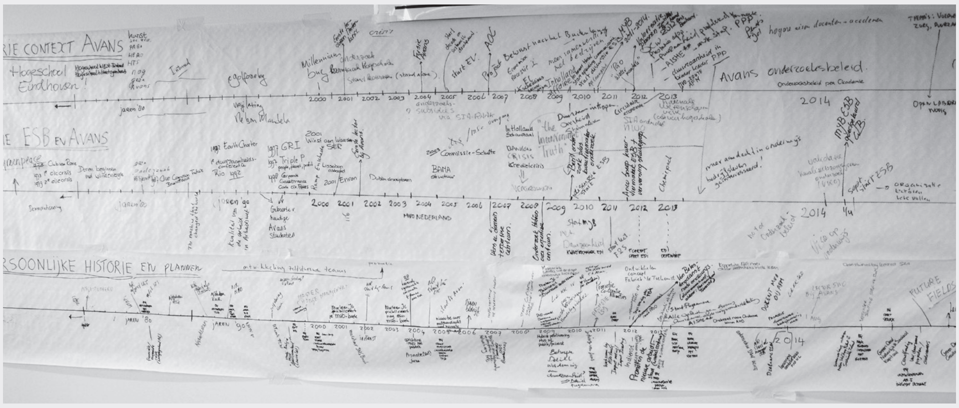

Figure 2. The three timelines hanging one above the other. At the top is the History of the World, in the middle the History of the development of the Expertise Centre, and at the bottom the timeline of the Personal history (impression)

After all the presentations have been heard and seen, the entire group searches for the common theme. We collect the conclusions in a popcorn fashion in a plenary session. Someone begins with an insight, and whoever wishes to add something. A volunteer writes the conclusions for the common theme on a flip-chart. The flip-chart sheets are then hung next to the timelines on the wall.

One of the insights from the meeting was that working together on the time-lines accelerated getting to know each other, which promotes the development of the network around the centre. Another conclusion was that a follow-up of this manner of working is necessary.

REFLECTION

In this way a collective inquiry takes shape, using qualitative analyses and a collective meaning-creation process. The long timelines serve as transactional objects to collect data and negotiate relationships and information between participants, making the invisible visible. Every participant has contributed to this collective overview. Everyone has also touched it with their hands. While participants write and draw, the overview begins to pose questions: 'What happened between these events? What did we do with that policy report? Ahh, when was that…?' This allows the construction of a shared frame of reference for the next round: the development of images of a successful future. It helps to determine the boundaries of the playing field, get everyone on the same page to talk about the context of the issue. The timelines trigger conversations, people develop stories and new language about the Centre. By standing as a group in front of the timelines, a sense of connectedness arises.

The method 'Timelines for exploring the past' is presented in Chapter 7. The following steps in this work meeting and a reflection on the operating principle are described in Example 2.

Here are several other examples of what a transactional overview could look like: large maps collectively produced, images of the future transposed from presentations of posters, a three-dimensional construction of any type. They are displayed in one overview that can be viewed by everyone directly, preferably at any time during the meeting. Chapter 3 explores the characteristics of a transactional object in more depth and how it contributes to change.

Using transactional overviews in regular meetings

This book focuses on the use of transactional objects in work meetings for addressing complex issues, but in my experience, transactional overviews are also effective in making regular meetings more productive. All of the methods described in Part II can be integrated in regular meetings.

'Hands-off' philosophy of managing

The work meetings in this book are designed from a *structural approach* to change. A structural approach assumes that it is easier to create structures that invite new behaviour in a large group of stakeholders. It differs from a *behavioural approach*, which tries to change the behaviour of a diverse range of stakeholders by, for example, addressing how they are doing (as can be done with individuals or small groups in coaching, teamwork, training, or therapy).

In a structural approach, the setting and the structure of the process invite new behaviour and a productive way of working. The path of change is cleared to a great extent by inviting the right stakeholders to meet in one room (*whole system in the room)* and work on issues that they find important. People come voluntarily and want to take responsibility for the next steps.

In this way of working, you as the consultant or supervisor have a facilitating role. You remain in the background or on the sidelines as much as possible so others can do the work. Marvin Weisbord and Sandra Janoff (2007) call this a 'hands-off' philosophy of managing. Facilitators help with formulating questions, materials, activities and methods to create a meaningful setting in which the participants can work (Barry 1996). Your skill as a facilitator lies in 'cooking with the principles' for effectively setting up and directing a customised setting for the exploring and harvesting process in the work meeting. This book explains what these principles are and illustrates with methods and examples how you can apply them in practice.

Reading guide

The first part of this book (Chapters 1-6) contains practical theory about the principles and instructions for use for co-creation in work meetings. Chapter 2 presents the guidelines for when co-creation in work meetings is meaningful and when it is not. Chapter 3 is a more theoretical chapter. It explores in more depth what a transactional object is and does, how it makes the invisible visible and contributes to the change process. You can skip this chapter if you assume that it works and do not have any interest in the underlying theory. Chapter 4 explains the basic principles that ensure that co-creation works. Definitely do not skip this chapter because the better you apply these principles in practice, the more effective your meeting will be. These principles also apply to action research.

Applying the principles in practice is best not done alone, it is preferable to work with a design team in which the most important stakeholder groups are represented. Such a design team is also called a planning group or steering committee. NB: this is *not* a sounding board group or focus group. Chapter 5 covers working with a design team. This also involves a co-creative method with a transactional overview, a long timeline. You use the timeline to design the work meeting together, one suited to the context of the larger change process. The timeline for process design is at the same time Method 1, to make the invisible visible with transactional overviews.

Chapter 6 describes what hands-off facilitation involves and gives many do's and don'ts for implementing that in work meetings for co-creation.

The second part of the book describes another 11 methods for collective inquiry and harvesting results in work meetings. Part II starts with an overview of the methods and the goal you can use them for. Keeping in mind the starting points from Part I, you can shape co-creation and/or action research in work meetings together with the design team. There are many starting points and working elements. Luckily, many of them are already incorporated in the method; each method is described in detail.

Chapter 2

When to use co-creation in work meetings?

How do you know when co-creation with stakeholders in work meetings would be appropriate? This chapter offers guidelines to help you decide. It also provides more insight into the differences between top-down planned change and trial-and-error change with the whole system of stakeholders.

The issue is important and complex, it is worth the effort

The first condition for the work meeting is that the issue is important. It must be worth the effort. Inviting groups (large or small) of stakeholders takes time, money and energy. The issue must be very important for the potential sponsors and other stakeholder groups. Second, you must need each other for success. If a manager with a project team of experts can resolve the issue, you do not have to invite other stakeholders to join. The principle is: keep your approach as simple as possible. Co-creative work meetings are particularly suitable for complex issues. The Cynefin framework of David Snowden (Snowden & Friends, 2021) offers more clarity about the kinds of situations you can encounter and aids better understanding of the nature of complex issues.

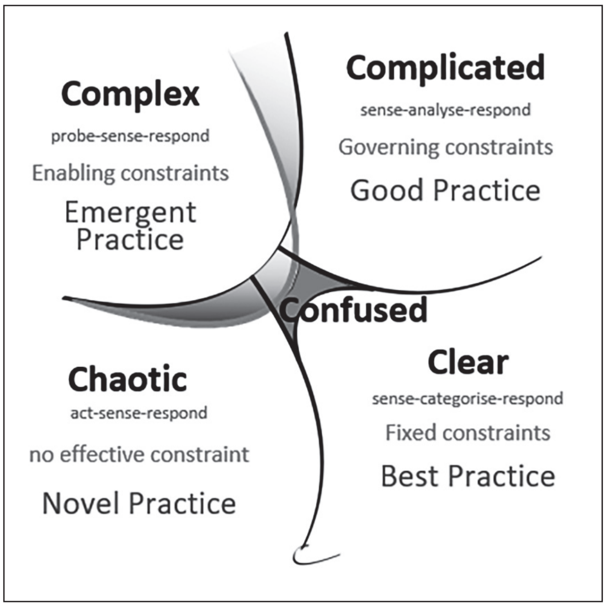

Figure 3. The Cynefin framework of Dave Snowden (Snowden & Friends, 2021)

The Cynefin framework distinguishes five types of situations, depending on what we know about the relationships between cause and effect, what the sequence is for action, and what results there may be. It provides a guide to when co-creation in work meetings is beneficial and when it is not:

1. *Clear situations*. Cause and effect are set (fixed constraints).
   It is obvious what the best solution is, there is a best practice. For clear situations, co-creation is overkill, it costs more time and effort than necessary. The sequence of actions is sense, categorise, respond.
2. *Complicated situations*. The link between cause and effect is not immediately evident, often it takes some time before you get to know it. But there are guides (governing constraints). There is more than one possible solution. This type of problem can be solved by diagnostic research done by experts, which leads to various good practices. If experts can resolve the problem, it is not necessary to involve stakeholders for co-creation. The sequence of actions is sense, analyse, respond.

3. *Complex situations*. It is not known what causes what precisely. Many people and factors are involved, which influence each other continuously. It is only possible to estimate the results of an intervention afterwards. You must dare to experiment, work with ideas deriving from a range of causes and possibilities (enabling constraints), which lead to emergent practices. Complex issues are particularly suited for co-creative work meetings because new things can arise by trial and error in the collaboration. The sequence of actions is probe, sense, respond.
4. *Chaotic situations*. You want to get out of the chaos as quickly as possible, often there is no time or way to understand what happened, you have to respond quickly, in a way that you probably never have tried before (no effective constraints), implementing a novel practice. Crisis management is dominant, there is no time to conduct collective exploration in the chaos. The sequence of actions is act, sense, respond.
5. *Confused situations*. It is unclear what the situation is where you find yourself, probably because leaders observe different situations. That leads to confusion. It is unclear what must be done, except for trying to land in one of the other situations. Co-creation cannot be organised in a situation of confusion.

Co-creation in work meetings works best in complex situations. Insight into complex issues derives not from analysis, but from trying out new things and finding what works in an iterative process. The Cynefin framework also helps us to shift from exclusively understanding with our intellect and our knowledge to understanding the importance of our bodies, spirit and intuition. The book by Snowden and Friends (2021) contains many examples of this, particularly on p. 147.

The circumstances must be right

Along with the complexity of the issue, there are other conditions that determine whether inviting stakeholders for co-creation is a good idea. These conditions cover the extent of ownership and engagement of the stakeholders, the clarity of the path to be followed in the process, whether the formal leaders already have an idea of what the result must be and how important the issue is. Sometimes a planned change is better, or a combination of a planned and emergent change.

Table 1 presents ways to determine whether the correct preconditions for co-creation are present, with several examples. The further to the right the sliders of the conditions in Table 1 are, the more suitable the circumstances are for co-creation work meetings.

Table 1. How to determine the right conditions for co-creation in work meetings (modified from Van der Zouwen, 2022)

	CONDITIONS (slides)	
Low ←	**Required level of ownership**	→ High
Clear ←	**Process, way forward**	→ Unclear
Low ←	**Complexity of the issue**	→ High
Set ←	**Desired results**	→ Open
Low ←	**Importance of the issue**	→ High
No co-creation We know what works	**Co-creation possible** What could work?	**Co-creation** It is unclear what will work; this must be determined by trial and error in a continuous process
Examples	**Examples**	**Examples**
We want everyone to know what the company's vision is.	We want to get suggestions to realise the company's vision	We want to develop a shared vision with the different stakeholder groups
We want to implement procedures for a better collaboration between the headquarters and the regional branches	We want to know how the employees feel about the procedures for improved collaboration	We want to explore with employees and other stakeholder groups how the collaboration can be improved
We want to measure the citizen's wellbeing in this community	We want to consult the citizens about how to improve their wellbeing	How can we become a wellbeing community?

Key chapter points

Work meetings for co-creation must be worth the effort, and the conditions must be right. Summary:

- The issue is important enough for the stakeholders.
- The stakeholders need each other to guarantee progress with this issue.
- The issue is complex, wisdom goes beyond analysis or analytic thinking, the path forward is unclear (partly).
- The desired result is still open (to a certain extent).
- Formal leaders are prepared to work with the stakeholders, and to share some power when making decisions.