



Customizing for Groups: using educational programs to seed organization change

If you are bringing a group into one of my programs, you're likely interested in the possibility of collective change. It's a great first step! Individual growth is necessary, but not sufficient, to create organization change. In order for any educational program to result in organization development (OD), the conversations must stay alive until change has a chance to take root.

Here are some of the design areas I think through when I design change initiatives. They can help you customize my online programs for your group.

1. Readiness (yours and your group's)

- **Make sure that your group is ready** for this conversation. They don't have to be enthusiastic, but they have to be open to new ideas and have the capacity to devote energy to learning as individuals and as a group.
- **Make sure you're ready** to invest time and energy into cultivating this conversation with your people. It's one thing to sign up for a program together and individually explore new ideas (like a book club). It's another thing to take on an OD initiative.
- **Be clear about your intentions.** Don't make promises you're not ready for. If you're in collective exploration mode - no worries! That's valid. These programs are great for that purpose. Make your intention clear at the outset. You can follow up in the future with an OD initiative if/when you are ready to invest the necessary time and resources.

2. Expertise (facilitation, teaching, content)

- **Consider asking your folks with facilitation expertise to help you facilitate educational conversations.** It can be challenging to be both a leader, participant and facilitator.
- **Consider asking your folks with teaching expertise to help you customize the content and structure for your group.** My online professional development programs are less structured than my custom-designed OD educational programs. You'll want to augment my program with an internal structure. (More on this in #3.)
- **Invite your people with content expertise in related areas to participate.** Some of the research will directly conflict with traditional management practices. The folks who lead your work system will need to be involved for larger-scale change. It's best to have these foundational conversations sooner, rather than later, especially if you're hoping for system change to take root. Groups that have related expertise include Quality Improvement, Workflow Design, Leadership Development, Wellness, Employee Assistance, Organization Development, Safety and Human Resources.

3. Structure (expectations, format, frequency)

- **Explain your expectations to your group and have a discussion** about them. Are they realistic? What are their individual expectations? What does 'success' look like at the end of three months?
- **Consider the sequence, pace and amount of content for your group.** My online programs are designed for people to keep coming back - not to 'complete' and check off their list. But your group will want a sense of completion in order to move into the next phase, planning change. Think about how best to provide a sense of completion that honors the group's capacity and the timeframe you have in mind. You can print out the other articles and come back to them. Or consider coming back to do more together as alumni in the future.
- **Shorter, more frequent conversations are more effective.** The goal is to supplement my program's live-calls and online discussions with your context-specific conversations. I strongly recommend you schedule weekly conversations with your group (45-90 minutes). If someone misses a conversation, they can jump back in the following week. But if your scheduled meetings are twice a month, missing a session means being away for a month. In a three-month program, that's a long time to miss.
- **Retreats are fine, but don't rely on them exclusively.** Waiting until the end of the program to have a longer conversation (e.g., retreat) isn't as effective as multiple shorter talks along the way. People will have forgotten a lot (or fallen behind) without a supportive structure along the way. Using a retreat to help participants explain what they learned to colleagues can be useful, but 'train the trainer' won't be possible after a three-month program. This content is complex, nuanced and interconnected.
- **Use me and other participants as a resource.** Use some of your group time to shape questions for me and the other participants. Take advantage of collective wisdom while you have access to it.

4. Congruence (model the program's core messages)

- **My programs' core message is to promote more humane work systems.** Try to embody the message in the ways you ask people to engage. Be gentle with yourselves and others. 'Driving' or 'controlling' this conversation will be incongruous.
- **Preserve choice.** You might ask participants which articles are of most interest to them, and make sure to include them in your group's reading list.
- **Don't use rewards or punishments to 'motivate' participation.** This goes back to readiness. If the timing isn't right for some folks, they might be able to participate in the future.
- **Cultivate Self Awareness.** I highly recommend you include Chris Argyris' article *Good Communication that Blocks Learning* (in the Change section) in your group's reading list.

5. Safety (psychological)

- **This is an educational space.** In order for people to learn, all of us need to make it safe to share ideas and half-formed thoughts.

- I suggest you **go over the program's Community Agreements and customize them** together. What is confidentiality in your context? How do your folks define respect?
- **Walk through Group Behaviors together.** Which of them are your 'favorites' – aka, the ones you're most likely to exhibit in a group setting (constructive & destructive)?
- **Consider reading Parker Palmer's transcript together, *The Violence of our Knowledge*** (in the Oasis section) as one of your first readings. It sets a beautiful tone for what educational experiences can be.

6. Transparency (yours & your organization's)

- **Share your insights with your group.** Be vulnerable. Model self-awareness as best you can. Think of ways to shift your own thinking, before suggesting others shift theirs.
- It is likely that **some of what you learn will be dissonant with the way your organization functions.** The research is clear, but much of it hasn't been implemented in traditional management structures. That is normal. Talk about it together.
- **Discuss the alignments and divergences, without blame.** Be transparent about what you see as potential areas for change, while not projecting intention onto others (e.g., question the reward structure, not the people who implement it). Most people are well intended and doing what they have seen done. Most professionals are not aware of this research. Even if you have a management degree, it's unlikely you've been exposed to all of these concepts.

7. Integration (into existing structures)

- **Consider how you can bring these conversations into existing meetings and processes.** The most powerful and effective way to show the importance of something (e.g., values, relationships, etc.) is to make time for it on a regular basis. It's great to add in extra meetings during a program to build momentum. But after three months extra meetings will fall away under the weight of busy lives. If you start to include these concepts in the regular work week, letting go of something of lesser priority (which is the tricky part!) the likelihood of your group implementing change skyrockets.
- **Weekly staff meetings.** What your group spends time on when it gets together shows what you are committed to. Some groups talk about (physical) safety during their weekly staff meetings. What about including adding in conversations about psychological safety - a vital part of safety culture? (e.g., How do we make it safe for our people to tell us what's really happening? Do we know about near-misses, if not, why not? How does our reward structure help or hinder our safety culture?)
- **Annual Reviews & Retreats.** It's great to include health-promoting conversations in less-frequent but high-profile events. Keep in mind that unless these conversations are happening throughout the year, the high-profile events are unlikely to shift behavior.

I hope this is helpful. You can learn more about organization change in [Be Change: Healthy Organization Change](#). I can also help you through my consulting practice, just email me at katherine@katherinesandersconsulting.com.