AKRI'S COLLABORATION AND SUPPORT FRAMEWORK

FOR GR CONFERENCES AND RELATED TRAINING EVENTS

AKRI POLICY ADOPTED 8/20/ 2021

Introduction

Few issues have held more controversy and complexity for AKRI and Affiliate Centers than that of coming to agreement on criteria for sponsorship of conferences. The issue of what constitutes a "traditional" group relations conference, as distinct from a here and now conference using a different model (e.g. NTL), addressing a specific population or topic (e.g. Social Action, Addiction, Disabilities), or introducing additional or experimental aspects of design (e.g. ropes courses, 12-step meetings, virtual events, Social Dreaming, etc.) has been a focus of discussion and debate for the entire GR community.

The following is AKRI's working policy to improve the clarity, consistency and transparency of AKRI's collaboration and support for Group Relations Conferences, Conference Training Events and other GR-based experiential events. It is designed to ease collaboration with AKRI Affiliates and with other organizations. It also attempts to balance two important goals related to our core mission; that is, to maintain the intellectual integrity and competent implementation of Group Relations theory and practice, while at the same time encouraging innovation, experimentation and development in GR theory and practice. Thus the new policy contains several layers or tiers of AKRI engagement and support for experiential work, to allow for varying levels of adherence to our traditional models, and to AKRI's current competency standards and membership requirements.

This policy is the result of over two years of work, study and reflection on the part of the conference committee, with input from the AKRI Board, the Training & Certification and Director Development Committees, as well as the AKRI Affiliates (as of spring 2020), and several seasoned directors / professors who teach GR theory. That said, the intention of the Committee, on behalf of AKRI, is that this is a living document, subject to changes as new understandings and world conditions emerge that may change our collective thinking.

The AKRI Conference Committee:
Dr. Sonny Cytrynbaum, AKRI Fellow
Dr. Mary McRae, AKRI Fellow
Dr. Carl Mack, Jr., AKRI Fellow
Dr. Rene Molenkamp, AKRI Fellow
Dr. Sarah Rosenbaum, AKRI Fellow (Chair)

Section I: Defining Criteria for a GR Conference

The following parameters have been established defining and/or limiting the scope of what constitutes a "Group Relations Conference." These criteria will form the basis for the conference committee's consultations to directors, and for its recommendations to the Board regarding AKRI's engagement with proposed projects.

A "Group Relations Conference" must:

- **Retain as the primary task a focus on both overt and covert, conscious and unconscious processes related to authority, leadership, and power in group or organizational life. Any aspect of group life in relation to this primary focus is equally valid to study,** whether that be particular facets of social identity, particular organizational structures or models for leadership and followership, or particular application sectors (e.g., clinicians, academic institutions, military training, etc.).
- Include significant portions of time spent in "here and now events"; i.e. the locus of study must be what is happening in the room and in the present moment.
- Include reflective events in which participants have opportunities to review their experiences and work to apply their learnings to their lives outside the conference.
- Be of sufficient length to do both these things with some rigor (two full days at a minimum). Shorter events using GR methodology are more properly identified as workshops, introductions to the method, demonstration events, etc.
- Keep the locus of study on the functioning of the group or system as a whole. That is, an individual's behavior is relevant for public study only as it relates to discerning the needs and dynamics of the group at that moment. An individual's own intrapsychic processes are not addressed directly.
- Include opportunities to study the interactions among parts of the system and the functioning of the system as a whole, such as Intergroup, Institutional, and/or Institutional Systems Events.
- Retain the framing of a group relations conference as **educational** in nature, that is, to provide learning opportunities for its members without a predetermined agenda about what members "should" learn. While GR methodology may be useful in pursuing other goals, e.g. furthering particular social or political agendas, artistic explorations, improving mental health outcomes or facilitating organizational change, such events should be clearly described and labeled as such, and should not be identified as "Group Relations Conferences."
- Other events may be added to the "traditional" GR elements of Small Group, Large Group, Intergroup, Institutional Event, Plenaries and Reflective events. However, the rationale for such additions should be clearly articulated, and must still relate to the primary task of learning about group behavior.

Subsection four below will address AKRI's approach to supporting conference designs or other types of experiential events that seek to experiment, innovate or expand the use of GR methodology.

After eight months of review and exploration with directors, staff and members, The Conference Committee has provisionally concluded that "virtual" or "online" conferences do appear to contain the requisite elements and produce enough of the same phenomena (projection, splitting, projective identification, etc.) to "count" as Group Relations Conferences, though it is also clear that significant differences between online and in-person events exist. It is the hope and recommendation of the committee that such events will continue to be studied, both qualitatively and quantitatively to better apprehend both the differences and similarities to in-person events. For the present, online conferences will therefor receive the same review and consideration for AKRI support as in-person events. Note that such conferences must indicate in the title or main subhead that the event is "virtual" or "online," and so is the locus of study.   The committee is available to consult about particular challenges and aspects of the work peculiar to remote learning upon request.

Section II: Criteria for AKRI Sponsorship and/or Collaboration

Level 1: Primary AKRI Sponsorship

a. **The AKRI Board is the primary contractor** for an AKRI-sponsored conference and will hire the director.
b. AKRI has formal approval authority over the Director's design, budget, staffing choices, location, and calendaring.
c. Conference will adhere fully to AKRI policies: Right to Work (RTW),* use of Consultant Candidates, organizational membership in good standing, etc.
d. Marketing and recruitment responsibilities are shared between AKRI and the Director.
e. AKRI assumes full or primary financial risk.
f. AKRI expects all or largest proportion of profit if any, unless otherwise negotiated with the Director at the time of contracting.
g. AKRI "owns" products such as director reports, member lists, etc. The Conference Committee will advise the AKRI Board and/or the Conference Director as requested, on all aspects of conference design and planning, as well as adherence to AKRI policies.

Level 2: Full Co-Sponsorship

a. **One or more equal partners and AKRI** contract to mount a GR event, such as a conference or GR training. An equal partner can be:
    i.   An Affiliate
    ii. Another GR organization

iii. An outside entity interested in mounting a conference with AKRI, such as a university, an organization, a community.
   b. Responsibility for design, staffing, location, timing, etc. is negotiated with the partner, depending on that partner's needs, expertise in GR work, financial and operational capacity, etc.
   c. RTW*, trainee spots and other aspects of AKRI's policies are adhered to, unless otherwise negotiated as part of the collaboration agreement.
   d. Financial risk, seed money, administrative support and profits may be shared, in manner negotiated with the partner as part of the collaboration agreement. The Conference Committee will review collaborative proposals and approve them or make recommendations to the Board, which retains final authority over any collaboration or contract involving expenditure or risk to AKRI funds.
   e. Marketing and recruitment are shared responsibilities.
   f. AKRI and partner equally "own" products such as director reports, member lists, etc.
   g. Collaboration may be initiated by the partner or by AKRI.

*Policies regarding current RTW competency requirements and certification may be obtained from the Training and Certification Committee of AKRI. AKRI also requires that all US-based staff of a Level 1 or Level 2 sponsored conference be members in good standing of AKRI **or** one of its Affiliates. Through its Training and Certification Committee, AKRI is continuing to explore and develop processes for appropriately authorizing consultants who fall outside of these criteria (e.g. university-trained consultants, consultants authorized by a partner organization, etc.). AKRI also maintains a list of approved international GR organizations, whose consultants are authorized to work in our conferences after successfully consulting three times in their home organization.*

Level 3: AKRI Endorsement
   a. AKRI may lend its name to a conference entirely conducted by another party. Conference marketing materials can include notice of AKRI endorsement *(which will be visually represented in a manner distinct from co-sponsorship),* and use AKRI platforms to advertise
   b. Conference design still adheres substantively to AKRI guidelines for GR conference design, as described above.
   c. Purpose, design, staffing, etc. are reviewed by AKRI Conference Committee before agreement is given to use AKRI Endorsement language or logo.
   d. Production of the conference is the sole responsibility of the other party.
   e. AKRI RTW* policies are encouraged but may not be required.

f. Consultant Candidates wishing to count work as consultants in such conferences toward completion of their training requirements should consult the T&C Committee BEFORE participating. This committee will determine whether the experience can be counted, and will set out the necessary conditions, such as in-conference mentoring, trainee performance feedback, etc.

g. No AKRI funds are risked and no financial gain is expected, unless specifically negotiated.

h. Other party "owns" products such as director reports, member lists, etc. (AKRI will generally negotiate access to products as part of endorsement).

Level 4: AKRI Support for Incubator Initiatives, Research & Development, Experimental and Hybrid designs

a. **AKRI encourages and** supports here & now projects, either initiated by AKRI (sponsorship) or in support of partners, that include GR methodology but are not traditional GR conferences, and seeks to balance this support with thoughtful and ethical adherence to its core mission and values.

b. The Conference Committee has identified two general types of innovative or exploratory projects:

    i. Conferences that maintain all traditional conference events and methodologies but seek to explore goals other than, or in addition to, member learning about authority and leadership in group life. For example:

        1. conferences designed with explicit social action goals

        2. Dual-task conferences such as addiction recovery or spiritual development

    ii. Conferences that retain the primary task of member learning about aspects of authority and leadership in groups but seek to explore or innovate around conference methodology, for example:

        1. "Third-Way" Tavi / NTL conferences

        2. Experimental designs leaving out core elements as defined in Section 1

        3. Designs adding significant elements such as ropes courses, Bridger-type tasks, etc. that have not been fully studied in terms of their impact on the primary task.

c. The AKRI Conference Committee will review and approve such proposals on a case-by-case basis and make recommendations to the Board regarding the appropriateness of AKRI engagement or support.

d. Marketing materials for such projects must clearly indicate the nature of the conference or GR event, and refrain from casting an experimental conference as if it is a traditional one.
e. AKRI RTW criteria may be waived or modified if appropriate.
f. Consultant Candidates wishing to count work as consultants in such conferences toward completion of their training requirements should consult the T&C Committee BEFORE participating. This committee will determine whether the experience is sufficiently in line with AKRI training goals to be counted, and will set out the necessary conditions, such as in-conference mentoring, trainee performance feedback, etc.
g. Level 4 conferences or workshops will not use the AKRI logo, but will be able to use the following statement in marketing materials: "Supported by the A.K. Rice Institute as an *Incubator Initiative* in the *development, exploration, or application* of Group Relations."
    i. Phrases in italics may be modified or tailored to most accurately reflect the particular event.

Section 3: Benefits and Expectations Related to AKRI's collaboration and support

All conferences and training events approved at any level as described in this document have access to the following benefits:

- Posting of the event on AKRI's calendar
- Consultation on any aspect of conference design or production from the Conference Committee upon request

Levels 3 -2 – 1 (Level 4 as below)

- may also have marketing materials distributed to AKRI's master list of potential members and contacts.
- AKRI will request and expect list sharing of attendee contact information in return, except in such cases as the primary sponsor may be constrained from doing so (e.g. some university confidentiality policies etc.).
- Level 4 conferences or experiential events will be evaluated by the conference committee on a case-by-case basis for appropriateness for general marketing through AKRI.

Levels 2 or 1 only*

- Potential for seed money, costs and risk / profit-sharing with AKRI as recommended by the Conference Committee and negotiated with the Board
- Protection under AKRI's General Liability insurance policy ("slip and fall")
- Access to AKRI Administrator to help with pre-conference registration and other technical support (some charge may apply for this depending on the amount of time needed)

- Use of AKRI's credit card processing capacity (at cost to AKRI)
- Active marketing of the event by the AKRI Board

*Under certain circumstances AKRI may provide financial or logistical support for **Level 4** events. Given the nature of events 'on the boundary' of group relations, such decisions will be made on a case-by-case basis in consultation with the Conference Committee.

Section 4: A Final Note about Authorization

The Conference Committee has been asked on several occasions about the use of language that indicates AKRI has "authorized" a conference or its director. While some level of authorization is implicit in the provision of any kind of support to a project or individual, it is the position of this committee that AKRI cannot meaningfully "authorize" an event unless it has the power to meaningfully de-authorize it. That is, AKRI "authorization" adheres only to conferences for which it is a primary or co-equal sponsor, and to directors (and by extension staffs) over whom it has direct hiring authority.