The Institutional System Event (ISE): Design and management

Stan De Loach, Ph.D.

With gratitude to Shelley Ostroff (Tel Aviv), Louise Edberg (Stockholm), Christophe Verrier (Paris),

and Jacqueline Ternier-David (Paris) for their generous contributions!

He who fights against monsters should see to it that he does not become a monster in the process. And when you stare persistently into an abyss, the abyss also stares into you. Irrationality among individuals is something rare, but among groups, institutions, epochs, it is the rule.

<div align="right">– F. Nietzche</div>

The Institutional System Event (ISE)

The design and management of the ISE outlined herein reflect a unified amalgam or an integral combination of elements and primary tasks of the Intergroup Event (IG), Institutional Event (IE), and the Institutional System Event (ISE) as conceived, practiced, and transformed respectively by two group relations (GR) conference institutions: (1) the Family Institute at Northwestern University and the Center for Applied Psychological and Family Studies, and (2) the International Forum for Social Innovation (IFSI), Paris, France. The IE as well as the ISE are here-and-now experiential events typically involving more than 50 participants.

Both of these GR institutions have an equally long and distinguished pedigree. The 2013 annual conference will represent the 37th annual conference for the former institution and the 36th annual conference for IFSI. The parallel development of the two separate organizations during almost identical periods of history, in different countries and cultures, supplies a maturity ripe for significant hybridization, opportunities for innovation, and powerful enrichment and transformation of experiential learning for conference members and staff.

The ISE incorporates and transforms most of the focus and learning opportunities commonly associated with the IG and the IE, but it extends significantly the experiential possibilities and educational outcomes of the other two events. For example, rather than focusing on the nature of intergroup or inter-subsystem relatedness, the ISE directs participants' attention to their relatedness to the Management of the entire system in which they are all working.

The tasks and structures of all three events, while logically related, are conceptually distinct. Intergroup behaviors can be used as material for analysis and learning, but intergroup aspects of behaviors remain qualitatively different from purely institutional-level behavioral or psychodynamic manifestations. Focusing on intergroup behaviors provides a partial because isolate view of the entire system; that is, intergroup behaviors and dynamics are relevant to the entire system, but because they are easily viewed individually or as discrete from their meaning in the overall system's behaviors, the data that they provide can be an incomplete, isolated, or distorted characterization of the system as a whole.

In other GR learning events, the overarching intra-system boundaries (between management, consultants, and members) are not often publicly brought to conscious examination in order to understand the conference system, as a whole. In the IE, the intra-system boundaries (that is, intergroup boundaries pertaining to different subsystems of the conference institution-as-a-whole) are explored in order to examine, understand, and interpret the developing relatedness between and among member-designed subsystems and the staff subsystems. In the IE, a verbal portrayal of the entire system is derived from an assembly or consideration of its separate and discrete parts.

For clarity's sake, the three components of any GR conference system are defined as:
>**Participants** = Category including both conference staff members and conference Members, who normally are paid or have paid to be physically present
>**Staff** = Conference management (including administrative team personnel, who are sometimes referred to as "coordinators of resources") and consultants. Staff persons are usually paid to be physically present and available for work before and during the conference.
>**Members** = Persons who have paid to attend the events and have agreed to take up the learner role in the GR conference; persons who have received full or partial scholarships or otherwise paid reduced registration fees are nonetheless also classed as members.

The four components of the institutional system event (ISE) are also referred to collectively as **Participants**. These components are:
>**Management** = The conference directorate, the administrative team, the convenors of the large study system, the small study systems, the review/role application systems, and, in

some event designs, one Member in a successive, non-repeating, single ISE-session participation in Management functioning. ISE Management is never identical to conference staff or to conference management.

Consultants = Staff members who are operating as consultants during the ISE

Staff = A collective comprising both Management and Consultants. This term is not employed during the ISE because it does not describe any associated task, function, role, or component of the event.

Members = Persons who have paid to attend and take up the learner role in the GR conference and who have no permanently assigned managerial (other than a self-managerial) or consultative responsibilities during the conference.

During the ISE, Members' emphasis on and portrayal of selected, discrete dynamics or components of the conference system's psychodynamic and physical functioning may be expressed in sometimes ambiguous observable behaviors. For example, Members may form single-sex subsystems, self-protective, dependent, or fight/flight subsystems, care-taking subsystems, subsystems patterned on Management's behaviors, or subsystems expressing disparate though unconsciously interconnected or collective aspects of their conference experiences, usually with no or middling evidence of awareness of a linkage to Management's behaviors and the psychodynamics of the conference system-as-a-whole.

The Members' physical, psychic, political, and spiritual relatedness to ISE Management (and vice versa) may already have begun and been nurtured even prior to the beginning of the ISE; consciousness of this relatedness may gather strength and discernible form during the task-centered conference events that precede the ISE. They may then be "acted out" or re-enacted in a relatively static (i. e., untransformed) fashion in the context of the ISE. Direct examination of Members' complex relatedness to Management may reveal basic or primitive levels of meaning in the system's behaviors. Such examination is more essential to the ISE than to the IE.

During the IE, the institution identifies participants as either "staff members" or "conference members." It does not clearly distinguish between managers of the institution and consultants working in or for the institution. This lack of distinction leaves latent the members' connections and responses to management's work and may shield management and consultants from their contributions to or responsibilities for members' responses. The IE reduces the applicability of learning opportunities to extra-conference work settings, in which members might be more likely to benefit from learning to collaborate with managers than with external or internal consultants or other subsystems of the enterprise.

In contrast, the attention to the public but not necessarily conscious details expressed by Members and Management during the ISE is transformed by the latter's efforts to present working hypotheses about the event's sphere of concern, which is the conference system-as-a-whole, in its manifestations of physical, psychic, political, and spiritual relatedness. The working hypotheses, by facilitating the painstaking conversion of what is unconscious to what is conscious, stimulate institutional transformation, much as insight can promote an individual's transformation. The continual transformation of the institution being created and studied, through construction of and attention to Management's and Members' working hypotheses, energizes and supports the unique learning tasks of the ISE.

In the ISE, the focus of study promoted by the joint efforts of Management and Consultants is turned from individual or Member-formed group experiences during the conference to the development of a portrait of the system-as-a-whole, and especially of its subtle effects on the functioning of all participants in the system. This portrait is further clarified by conscious verbal comparison of the congruence or lack thereof between the participants' "system-in-the-mind" and the specific open-to-view and therefore discernible or knowable Management system.

Member learning is maximal when examination of the characteristics of the management system existing in the Members' mind and those of the public Management system active in the ISE reveals evident but not random difference. Whole-system working hypotheses highlight the incongruities in the nature of the real and phantasied relatedness of Members and Management. These enlightening comparisons unsettle preconceptions and untested suppositions, permitting renewed learning from experience, in the here-and-now.

Beyond a verbal portrait of the ISE system and its correspondence or lack thereof to the operant "systems-in-the-mind" lie possibilities for learning about transformation of the conference system-as-a-whole. The opportunities for system transformation (if desired) via awareness gained through experience of the conference participants' reigning "systems-in-the-mind" distinguish the ISE from other here-and-now conference events, including the IE. In the ISE, the physical and conceptual separation of managerial and consulting functions intensifies the experiential study of authority, leadership, and diversity as they exist "in the mind" and as they influence and reflect the conference system-as-a-whole.

In the IG or IE events, compiling a composite portrait of the system's different parts is done in order to discern or characterize the overarching total system. In contrast, in the ISE, a deliberate grappling with the entire system, including its Management, is employed to generate a picture of the system's different parts. In Melanie Klein's language, one might miss the fact that the body (the conference-as-a-whole) is absent a toe, if examination is directed in turn to the clothed arms, head, neck, stomach, back, legs, or internal organs. A total view of the whole body completely visible beneath the clothes may more easily demonstrate the missing or dysfunctional part.

The shift in interpretive focus and expression consequent to this oblique or rotated and, for Manager, Consultants, and Members, unaccustomed system-as-a-whole field of inquiry and learning can be disorienting, deskilling, and revelatory. Such inquiry and learning can be possible and fruitful in a block of even 7½ hours during a 2½-day GR conference schedule. In a typical weekend GR conference (of 2½ days), the ISE begins after approximately 33% of conference events have been completed and occupies 26% of the total hours available for conference events. These percentages do not vary significantly from those of week-long GR conferences (of 7 days), in which the ISE begins after approximately 35% of conference events have been completed and likewise occupies 26% of the total hours available for conference events.

During the hours of involvement in the ISE, participants may
✓ learn to liberate and utilize creativity and efficiency in dealing with institutional management, as opposed to the management system held "in the mind"
✓ explore their personal contributions to the system's difficulties, suffering, or inefficiencies...in other words, to the system's deviation from its tasks
✓ examine and transform the roles that they take up
✓ discover how to initiate, contribute with authority to, and lead transformation of the large organizations in which they daily participate.

The learning possible in the ISE is applicable to the outside institutions in which conference participants work or engage. Conceptualizing the system as a whole or as a totality is a valuable skill, rarely learned so well as during the ISE of a Tavistock GR conference. While small study system and large study system experiences are certainly educational and powerful, the learning realized in them is not so readily adapted or applied to settings outside the GR conference. Thus, the historical centrality of the institutional event in such conferences seems correct, timely, and well-advised.

Additional details on the learning possible during the intergroup event (IG) and the institutional event (IE) can be found at http://continents.com/IGandIE.htm. This article is also found on the internet at http://continents.com/ISE.htm. Also, http://continents.com/paths.html and http://continents.com/InstitutionalTransformation.htm.

Primary task of the ISE

The **primary task of the ISE** can be stated in a way that addresses the two complementary aspects of the experience (institutional and individual), namely:

> to explore the nature of the physical, psychic, political, and spiritual relatedness between Members and Management,
> in order to find opportunities for transforming through experience the way one practices authority, leadership, and management within the institutional system
> that is the conference

This system-focused task is pertinent for all Participants in the event, whatever the role they may take up. The task may be approached in varied ways, depending upon the individual's role in the ISE and upon her or his competence in that role.

Role of Management during the ISE

An impediment in realizing the ISE according to the fashion here described is the often insistent intrusion of staff members' personal and professional narcissism, which is frequently bruised by the separation needed for the Management/Consultant configuration. Consultants may perceive all the "action" to be in Management's sector, and occasionally vice versa. But competitive, rivalrous, or envious attitudes indicate a lack of understanding of essentially dichotomous roles or functions, intended to promote experiential learning opportunities almost nonexistent outside a GRC setting. In the context of the ISE, these and other attitudes derive from and respond to systems-in-the-mind about Management and one's individual or subsystem relatedness to Management.

The Director's decision about which consultant or consultants participate as members of Management during the ISE presents the possibility for further narcissistic discomfort *(and of course, learning)* for the Consultants. Members of Management may feel superior to the Consultants, as a way to avoid the pain of ignorance and uncertainty when faced with the requirement to collaborate in the development of working hypotheses on the total system level, not only with their fellow Management colleagues but also with the Members themselves. The separation of the two elements of staff members can be upsetting, disorienting, angering, even though in reality their efforts are complementary and they work to the same primary task, from within different roles. Consultants may seek a presence on Management as a way of avoiding tension or discomfort in the consulting role. Management's primary endeavor is different from the consultants' primary endeavor. The task of the event is the same for both segments of staff, but their responsibilities for furthering the overall primary task is different.

The impact of splitting processes between Management and Consultants *("we" and "them")*, if they are allowed to go unaddressed by the participants in the institution, is profound and detrimental. A split may occur because of hierarchical systems-in-the-mind held either by Management or by Consultants or by both. "Management is better/more prestigious/more effective/better paying/etc. than being a consultant" may be a phantasy or a part of a system-in-the-mind. Any projections by Consultants onto Management and vice versa are worthy of exploration. In order to function independently and collaboratively, Consultants require clarity of task and of boundaries; the provision and reinforcement of this clarity is, in large measure, the duty of Management in light of the significant differences in roles needed to carry out the ISE, in contrast to the simpler and more familiar IE or IG.

Previous experience of U. S. staff members may have been limited to participation in the event as a single staff, without clearly defined or addressed separate tasks, responsibilities, and accountabilities. Furthermore, such valuable separation may have not been demarcated by physical differentiation during the IE and may not have been available as a discrete focus for Member response (e.g., projections) and learning. Staff members' previous conference experiences may have constructed a shared "system-in-the-mind" of how the event is organized and how it "works." For these staff members, transformation, though learning by experience, of such systems-in-the-mind is a frightening, nay, terrifying, task inherent in the ISE design presented in this article. Times are changing, however, and the ISE design is becoming more familiar to North American audiences.

Designation of staff members' roles and acceptance of Members to function as parts of Management during the ISE

Prior to the opening plenary of the ISE, the Director may appoint one or more consultants to work as members of Management during the event. It is made clear that during all sessions of the event, they function as members of Management, not as Consultants or representatives of the Consultants. The consultants so appointed usually represent or direct functions important for member learning in other parts of the conference, for example convening the large study system, the small study systems, and the review or role application systems (generally, only if the latter have begun prior to or during the ISE). Their appointment to serve on the Management team is not announced publicly, though Members' representatives visiting Management's space will there

observe the activity and presence of these staff members who previously functioned as consultants.

The composition of Management is complicated if, for example, the Director has both a manager and consultant role, perhaps convening the large study system consultants and acting as a consultant to the large study system, or if the Associate Director has a similar dual role as convenor of the small study systems and/or consultant in them.

An ISE innovation used during the last 10 years is the short-term or temporary participation of a Member on the Management team, during each session of the ISE event, except during the opening and closing plenaries. In opening remarks for the ISE, the Director details the mechanics by which a Member may for a single session join Management. Joining the Management team is done anew by a different Member at the beginning of each ISE session. Member participation is on a first-come, first-served basis; no advance "reservations" are accepted. Members are informed during the ISE opening plenary that in order to join Management, it is sufficient to state, "I am here to work on the ISE Management team for the duration of this session." The allowed tenure of each Member on the Management team is for only a single ISE session; the tenure cannot be extended or repeated.

The rationale behind inviting a member onto management during each ISE session (except for the initial and final plenary sessions) is that member participation in management generally provides better content or basis or "contact with reality" for the management's hypotheses, because these are developed with the direct participation of a representative from the member subsystems. Also, the practice provides Members with the lived experience of institutional management.

Although no Member is present as a participant in Management during the ISE opening and closing plenaries, a Member may request to work as part of Management during all other ISE sessions. A chair is located in Management's ranks for this purpose. In the opening of the ISE, the Director emphasizes that individual Members who ask to participate in Management are not, during their presence, representing their own ISE subsystem (that is, the Members). Giving the Member who works with Management a copy of the map or diagram that shows the Member subsystems' spaces and distribution (see Appendix 1) is a concrete act that serves to represent the Member's admission and acceptance into the Management subsystem. A very large Management team might affect or dilute the usefulness of the addition of a Member to its ranks.

Which staff members constitute Management during the ISE? They are usually: all the members of the Directorate of the conference (that is, the Director, the Associate Director, the Assistant Director for Administration), as well as the convenors of the small study systems and the large study system. If the Review or Role Analysis subsystems are begun prior to the ISE and are therefore intervening events, a representative of that conference subsystem is also included in ISE Management. The usual approximate size of Management during the ISE is between 6 – 8 members, although its size is also dependent upon the conference design and the total number of staff members working in the conference. A maximum of about 30% of total staff members represents an upper limit rarely reached. It is essential to avoid a Management so large or "heavy" that each of its members cannot speak and contribute to the work at hand.

One Consultant may be drafted to work on Management during the ISE. The designation of consultants to the Management team for the duration of the ISE is not made public by the Director in the event's opening plenary. Rather, he or she simply states that, "The members of Management of the ISE are A, B, C, D, etc." Or "The Management of the ISE consists of A, B, C, D, etc."

Members of Management, including any ad hoc Members functioning as consultants during other conference events, have the double task of the physical management of the ISE and the management of its learning tasks. Management's activity thus involves the provision of boundaries and critical resources (physical, staffing, learning).

Prior to the opening plenary of the ISE, on behalf of Management,the Director authorizes the Consultants in their work during this event. It is made clear that all Consultants are plenipotentiaries, a subsystem of staff as a whole, fully authorized by the Director to work in a specific way (i. e., consulting) with the Members. It is also made clear that Management, Consultants, and Members share the same primary task, as defined by Management.

The Director designates or appoints one consultant to be **Convenor** of the Consultants during the ISE. She or he is responsible for the Consultant team's functioning and for its collaboration with Management and Members. The name of the Convenor of the Consultant team is at no time verbally conveyed to Members, and thus is not included in the Director's public introduction to the ISE during its opening plenary. In similar fashion, the identities of the convenors of the small study system consultants and the large study system consultants are not communicated verbally to Members during the conference opening plenary. The absence of these nominations relates to the study of authority and authorization, not power.

In turn, after reflection on the matter, the Convenor appoints two consultants to be present in the opening plenary of the ISE. It has been said that the most critical appointment that the conference Director will make is that of Convenor of the Consultants and that the most critical assignation that the Convenor of the Consultants will make is that of the two consultants who will work in the opening plenary of the ISE. The imperative ability or skill for all three of these positions is to voluntarily accept the role of Consultant as a non-management role.

Consultant role

Consultants are plenipotentiaries, at all times. As throughout the conference's existence, they have responsibilities for consulting to Members and Member-composed subsystems, though the focus for the consulting task varies from event to event. During the ISE, the consultants' client is the entire conference system, which they may best come to know by exploring the patterns of expression of relatedness between Members and Management. The Consultants' **primary task** is to facilitate the system's coming to know or become conscious of itself, of its systems-in-the-mind, and of the complex character of the relatedness real and phantasied between Members and Management.

Consultants consult to Members in ways that provide or increase opportunities for the latter to learn about the institution-as-a-whole, particularly through a focus on their real and "in the mind" relatedness to Management and the avenues imagined and available for transformation of that relatedness. They do not consult directly to Management, but to the shared primary task of the event. When they are not negotiating or providing consultation to Member subsystems, Consultants dedicate themselves to the shared ISE task of developing working hypotheses centered on the relatedness between Members and Management. Working hypotheses so developed may be shared with ISE Management and may be related to or developments of Management's own working hypotheses.

Consultants do not, in this model, dedicate themselves to the elaboration of system-wide working hypotheses. Such hypotheses may result from and in the course of the Consultants' work, but their development is not the primary task for the consultants. They may or may not share with management any such hypotheses; the decision usually rests with the Convenor of the consultants. The occasional exceptions to this way of working do not, as a rule, erase the fact that the consultants infrequently have time to elaborate such hypotheses and therefore do not have them to share.

Consultants' are wise to not attempt to supplant, compete with, have a "better" hypothesis than, or consult to management. The verbal development and sharing of working hypotheses solely or principally with management is not the primary task of the consultants. The Consultants' clients are the Members, with whom development or extension of working hypotheses, management's and/or their own, is, however, completely congruent with the task of the ISE. Members' own versions of their own or management's hypothesis or hypotheses are properly shared with management by the Members, not the consultants.

Two consultants, previously decided by the Convenor of the Consultants, are present at the plenary opening of the ISE. After the ISE opening plenary ends and all Members have departed the plenary space, these consultants rejoin the work of the consultant team, which in turn makes opportune contact with Management.

In distinction to the IG, Consultants are not present *de facto* during the initial or subsequent ISE sessions in the spaces set aside for Member-formed subsystems. Consultation is made available whenever it is suitably requested or deemed necessary and the request is acceptable or the

necessity pressing or self-evident. The request need not be "perfect," but the Consultants' contract with their clients should be clear and specific.

How this works in practice depends on the Consultant subsystem's internal task management decisions. Consultants do not operate with accompanying observers during the ISE. Likewise, for more than one Consultant to be working with a single Member subsystem (in the latter's space) is counter-task behavior, as it undermines individual Consultant's authority and authorization. Consultants remain plenipotentiaries throughout the ISE. Their authorization comes initially from the Director, then from colleagues, and lastly from their individual competence in taking up the Consultant role.

Consultants are responsible for consulting to the Members' performance of the task of the ISE: to explore and, if desired, open to transformation, the nature of their relatedness to Management. The consulting tasks start with the ISE opening plenary and conclude with the end of the ISE closing plenary. At no point in between do Consultants function as or form part of Management. During the closing plenary, which is a here-and-how event rather than a reflective event, Consultants remain in their role. Management manages the ISE and its closing plenary meeting through hypotheses, the analysis of data, and discussion.

Management typically does not define Members' seating arrangement for the closing plenary. As always, Members are free to do as they wish. Consultants and Management observe identical, Management-defined time boundaries, which are those that Management has most recently published for the ISE plenaries, sessions, and breaks. For the closing ISE plenary, all members of Management and all Consultants are present, in their respective spaces and roles.

Consultants' **task** during the ISE is: to provide opportunities for Member learning about physical, psychic, political, and spiritual relatedness to Management and about how conscious, preconscious, and unconscious systems-in-the-mind may influence their relatedness as well as their exercise of authority, leadership, and management within the total conference institutional system. This task is the same as the ISE's task, which the Director clarifies in the opening plenary. Before the ISE opening plenary begins, the Convenor of the Consultants receives a copy of the Director's opening remarks, which include Management's statement of the primary task.

The four dimensions of relatedness between Members and management, the physical, the psychic, the spiritual, and the political, will gradually be or become disclosed through the hypothesis-forming work of Management and in the consulting work of the Consultants. Everyone has experience with these four dimensions or aspects of relatedness to authority figures or Management, though they may not be conscious. The relatedness between Management and Consultants also may be manifest along these different dimensions, and are worthy of comment if so, but the ISE does not propose for Member's study the physical, psychic, spiritual, and political relatedness between Management and Consultants. Management and Consultants work to be aware of their own dynamics. Consultants do not offer them as foci for the work of the Members and Management during the ISE.

During the opening and closing ISE plenaries, which are here-and-now events for all participants who are present, Consultants consult to the relatedness between Management and Members (i. e., to the institution-as-a-whole) and to the multiple "systems-in-the-mind" creating and shaping it. Consultants do not provide consultation to Management. In their interactions with both Members and Management, they address the relatedness between Management and Members and the routine exchanges that express their role- and task-centered relatedness (sharing information, questions, ideas, hypotheses, for example).

During all plenaries and sessions of the ISE, Consultants consult to whole-system functioning and dynamics, specifically those in Members and Member-composed subsystems, as these suggest or reveal Member-Management relatedness. This shift in focus from small subsystems to system-as-a-whole, from individual to representative, may require direction and effort and may not be rapidly learned or implemented, especially if staff members' previous conference experiences have been with a distinct approach to learning about systems and subsystems, such as the IE or IG.

Consultants assist Member subsystems in working with their own and Management's hypotheses about the physical, psychic, spiritual, and political aspects of the relatedness between Members and Management. The Director may indicate to the Convenor of the Consultants the types of information from the Consultants' subsystem that he or she prefers during the ISE (examples: new hypotheses, Consultants' hypotheses, developments related to Management's hypotheses, suggestive subsystem composition, meaningful subsystem or inter-subsystem dynamics or behaviors, and thoughts on how any of these may contribute to the development of working hypotheses).

The information potentially useful to Management may be available to or known by the Consultants, but not so to the Management team, which can use up-to-date or updated information from this here-and-now event. If only out-of-date or old information is shared, the ISE is in danger of ceasing to be "here-and-now."

Management does not manage the Consultants, who generally decide the frequency and nature of their contact with Management, guided by understanding of task performance demands. Overall, it is helpful for Management to have information from the Consultants. Its content includes relevant aspects of the Consultants' work with or separately from the Member subsystems (for example, in constructing or supplying data for working hypotheses to explain the system's dynamics and behaviors). To assure appropriate access to relevant information, the Convenor of the Consultants may instruct the consultants to limit the duration of their consultations and/or to return to their work space 5 – 8 minutes before the end of each ISE session. Doing so avoids "capture" by Member subsystems and permits the opportune sharing of information during the ISE sessions, not during the "breaks."

Rarely, Consultants' behavior with respect to Management (for example, repeated withholding of information) may be of such importance as to be addressed in the content of working hypotheses, which aim to understand the total system. Since, like Consultant under-utilization by the Members, such withholding is a system behavior, it may be preferable to address it through the working hypothesis, rather than through sending a Management member to the Consultants' space with a request for information, although either or both remain viable options, at the Director's discretion.

Consultants' task during the ISE is to provide opportunities for the whole system to learn about the relatedness between Management and Members and about how the "systems-in-the-mind" may shape their relatedness and influence the way conference participants practice authority, leadership, and management within the conference as an institutional system.

As a managed temporary social educational system, examination of the physical, political, psychic/psychological/psychodynamic, and spiritual relatedness between Members and Management is central to its task and purpose. Consultants facilitate this work through attention to and analysis of the superficial and deep- or unconscious-level interactions between the Members and Management. The guiding hypothesis is that relatedness and phantasies about relatedness inevitably interact with or influence the way conference participants practice authority, leadership, and management within the conference.

The opening plenary of the ISE

The Director is the sole Manager present during the ISE opening plenary. Management, usually through the team of administrators, arranges all the chairs for the opening plenary of the ISE, except for the two chairs for Consultants. The latter position their own chairs in the event. The Director's opening discourse makes clear the deployment of Managers and Consultants members during the ISE, as well as the physical resources available. Moreover, she or he defines clearly the three types of representation employed in the ISE and recognized by Management: silent observer, unifunctional delegate, and multifunctional plenipotentiary.

These degrees of authorization for representation are presented as parts of the ISE structure that Management has adopted in order to function usefully in its interactions with Members. It is stated or otherwise made clear that they constitute Management's contract for working with Members during the ISE. That is, while the same rubrics are not obligatory for Members, they are the structure that both Management and Consultants will employ in their interactions with Members during the ISE. Members may do as they wish and may create their own structures for

relating within their subsystems. Consultants are available and constitute valuable resources in facilitating the ISE task performance. The physical processes of subsystem development, design, identification, and boundary management are more frequently and deliberately addressed in detail during the IE. They do not always relate so directly to the ISE task, which requires greater reflection, thought, and emotional exploration.

Two consultants are present during the opening plenary; the Consultant team, under the direction of its Convenor, considers who will consult to this important initial work of representing the Consultants and their task. For ALL consultants to be present at the ISE opening plenary is not an efficient option. Thus, neither all consultants nor all managers are present at the ISE opening plenary.
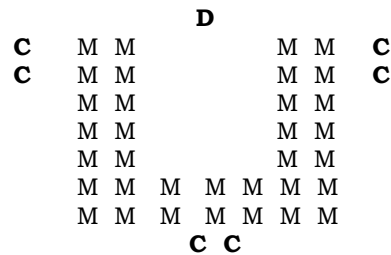
The Convenor of the Consultants ultimately decides which two consultants (logic suggesting one male and one female) will address the qualities of the relatedness between the Members and Management during the ISE opening plenary. He or she transmits this information to the Director, prior to the beginning of the ISE plenary and prior to the formation of Members' subsystems. The consultants designated for this initial consulting work decide themselves from what physical or geographical position within the plenary space they may best do their work; their decision is subject to comment inside the Consultant team. Having the Consultants selected to be present in the opening plenary arrange their chairs furthers the separation of the staff subsystems and enhances the need for Consultant authorization and autonomy. This responsibility for arrangement of their own chairs furthers the process of differentiation of roles.

The consultants inform the Convenor of the Consultants of their strategy and reasoning. They are always responsible for the physical placement of their own chairs in this space; Management does not manage the Consultants' tasks or movements, and therefore the administrative team, on Management´s behalf, does not arrange the Consultants' chairs. This logic explains the absence of Consultants in the work spaces offered to Members during the first session after the ISE plenary opening.

After the opening plenary is concluded, both consultants present relevant information to their consultant colleagues, who afterward may transmit this information to Management, in order to promote effective collaboration and to allay anxiety. The Convenor of the Consultants rarely or never leaves the Consultants' work space during the ISE. Conversely, neither are Members admitted to the Consultant's space, at any time or in any capacity (that is, as silent observer, delegate, or plenipotentiary).

The Director decides the design of the space for the ISE opening plenary. Because the information and concepts that he or she conveys during the plenary are complex and to ensure maximal understanding and engagement in them, the design for the chairs in the plenary space is frequently arranged to encourage task-centered attention. That is, to make visible the main characters in the event's task: Manger and Member.

Several spatial dispositions are made possible through the utilization of a "U" configuration, in which D = Director, M = conference member during the ISE, and C = Consultants (totaling two, in one of these three or other possible placements):

```
                        D
     C    M M           M M   C
     C    M M           M M   C
          M M           M M
          M M           M M
          M M           M M
          M M  M  M M M M
          M M  M  M M M M
                C  C
```

The Director either arranges the chairs in collaboration with the administrative team or indicates the spatial disposition desired to administrative team members, who implement it.

The Director takes questions from Members during the ISE plenary opening. But he or she does not consult to the Members. During the Director's participation in the ISE plenary opening, all other members of Management are engaged in arranging Management's work space in the assigned room under the direction (usually) pf the associate conference director. Arrangement of this space is neither a solely physical task nor the responsibility solely of the administrative team members. Except during scheduled "breaks" when the boundary to Management's work space is closed, this boundary remains open at all times from the beginning of the ISE opening plenary, including during initial arrangement of the space in the Director's absence. This is necessary to evidence and comply with the spirit of "management in public."

Prior to the opening plenary of the ISE, the Director may authorize the Associate Director to direct the physical arrangement of chairs and table(s) in Management's work space. Under her or his direction, all together, the plenipotentiary members of Management arrange the physical space, according to the Director's instructions, in a configuration (intra, page 22) that the Director defines to best promote Management's tasks. The consulting team, in its own space, does likewise, under the Convenor's direction and with the door to the space remaining open at all times, except for during the "breaks," when it is closed.

The physical arrangement of the space is straightforward and fairly rapid. The more significant task at hand is the development of an understanding about how Management and Consultants intend to function during the event. Definition of working procedures and task-related efforts is critical and requires some time to achieve, particularly if the ISE design used is a transformation of previously employed designs that may be at variance with descriptions presented here.

Administrative team

The conference administrative team, as an integral part of Management, continues to provide physical resources (chairs, paperboards, markers) to reasonable requests from Members and Consultants. These requests may be made at the door of Management's space, without the need for entry into the space or for formal negotiation. The basis for granting or denying a request for physical resources from Members is the Assistant Director for Administration's or the acting boundary manager's decision that the request is or is not reasonable or possible.

Administrative team members, charged with ongoing provision and delivery of physical resources necessary for Management's, Consultants', and Members' task performance, already have available a store of relevant data developed in interactions, including nonverbal ones, on the Member-staff boundaries prior to the beginning of the ISE. All members of Management (and of the Consultants, certainly) have such data, which are of significant importance. Of equal importance are the ongoing "here-and-now" data available during the ISE, which are, in the main, also available to all.

Ideally, administrative team members have shared significant data in their interactions with the remainder of staff during the events preceding the ISE, but the ready availability or revisiting of these data about the physical, psychic, political, and spiritual relatedness between Management and Members is essential during the ISE. While the incidents or interactions providing the data may not be new, immediate, or generally unknown, the institution's history and earlier manifestations take on renewed, explicit system-wide relevance during the ISE.

Their relevance may lie in either the formulation of working hypotheses to be entertained or the provision of data to either support or reject working hypotheses formed from other data. None of the processes involved in elaborating working hypotheses is straightforward, mechanical, purely conscious, or easy.

During the ISE, administrative team members are obliged to learn to manage themselves in both administrative and consequential system-management roles, so that full Management's access to the system-as-a-whole data that they possess and invite at the boundary of Management's space is not blocked by the constraints indwelling in the physical management activities required of administrative team members (for example, managing the Member/Management boundary or provision of supplies for Member and staff recesses, if any). These physical management activities may be demanding and stressful, but they need not automatically incapacitate the administrative team members for the interpretive aspects of Management's activities during the ISE.

Administrative team members, as members of ISE Management, are expected to share responsibility for the development of system-wide working hypotheses. During the ISE, the focus of exploration is not on the administrative team and their inner, personal relationships, but on the physical, political, psychic, and spiritual relatedness existing between Management-as-a-whole and Members.

Management's task

Management's task is the public formulation and transmission of working hypotheses relevant to understanding and making conscious the functioning of the conference system-as-a-whole. This task is both interpretive and communicative, inasmuch as the hypotheses provide promised opportunities for learning about whole system political, psychic, and spiritual functioning. Data useful in the formulation of system-level working hypotheses are provided by everything that happens in the conference, from its beginning, usually long before the conference actually convenes, up to and including its present and developing realities.

In distinction to the analysis of member-formed groups' creation and development carried out in the IE event, in the ISE the processes occurring are viewed and worked with by Management and Consultants through the perspective of what possible meanings and behavioral or enacted comments or messages the subsystems' decisions may reveal about their "systems-in-the-mind" and their relatedness to Management.

Nature of Management's verbal interventions ("interpretation")

Management's task is a variant of the overall conference task, namely, to examine publicly and to communicate the processes active in the institution as a whole and to formulate working hypotheses to make conscious and open to transformation the physical, spiritual, political, and psychic aspects of the relatedness between Members and Management. At times, it may be instructive not to state the primary task in great detail, leaving it as simply "to dedicate oneself to the published or stated primary task."

Management highlights evidence pointing to the participants' possible or hypothesized "systems-in-the-mind" and to these systems-in-the-mind as driving forces behind Members' behaviors in dealings with the Management of the ISE. On a spiritual level, for example, if Members in fantasy regard Management as omnipotent Gods, they may be less likely to have face-to-face interactions and transactions with Management or they may tend to make "symbolic" offerings or sacrifices to Management, or they may engage in perpetual exegesis of Management's scriptures (hypotheses). In such behaviors, they may also express an unwillingness to risk transformation or "conversion" of their current systems-in-the-mind.

Formulation and transmission of working hypotheses

Even though in an abbreviated time period for the ISE (e.g., a weekend, 2½-day conference) only a single working hypothesis may be reasonably clear or sufficiently revealed, its aim is to serve to make conscious and understandable institutional-level phenomena. This consciousness-raising may take place through a single hypothesis with one or more revisions or emendations or through more than one hypothesis.

Intergroup behaviors may reflect or be give rise to institutional-level dynamics. But they are not equivalent to the latter, which are rendered more fully comprehensible and conscious when viewed within the context of the total system's behaviors and meanings, as these express the Members' and Management's interactions. While intergroup factors may be observed, commented upon, even included in institutional level hypotheses, they are not meant to deflect the institution's attention from the dynamics of the system-as-a-whole.

Through its multifaceted task (of public formulation, transmission, and analysis), Management takes up or demonstrates authority and leadership of the ISE. Much of this authority and leadership derives from task dedication and competence in the task. Task competence is largely established through the labor-intensive processes involved in examining, understanding, interpreting, and communicating available hypotheses about the conference system and

institution as a whole. The ongoing (and never completed) outcomes of these efforts and interventions are shared with the remainder of the institution in the form of working hypotheses.

Each hypothesis that Management regards as tentatively true and suitable for use by the Members and Consultants is without delay written down in verbal form and promulgated (that is, read), so that Consultants and Members may, as they wish, incorporate them in the here-and-now as paths leading to a deepened system-as-a-whole understanding and as learning tools valid in system-as-a-whole transformation. Some conference directors prefer, when giving instructions for the promulgation of hypotheses, to ask for them to be delivered firstly to the Consultants, so that they are quickly informed and aware of the hypothesis, should Members promptly ask for consultation to address their content.

Usually and depending on the size of the conference membership, several representatives of Management spread out to deliver each hypothesis, in a speedy fashion. Each representative must, therefore, carry a written copy of the hypothesis. Members of Management may exhibit resistance, by delaying the transmission of the hypotheses to Consultants and Member subsystems. Any member of Management, except the Director, may deliver the working hypotheses formulated. During the ISE sessions, the Director does not leave Management's space; to do so would represent an abdication of the Director's role and responsibilities. Management's work of formulation is intense and involving. It requires thinking but also writing down hypotheses as it is being formulated so that delivery is accurate and not delayed.

The hypothesis (or hypotheses) developed collaboratively and collectively among Management, or dictated by the Director or other member of Management, with input from Consultants and Members whenever it is available or made available, are written down so as to make uniform and opportune their transmission to the multiple subsystems of the institution. They are not, however, written in stone and the Management team members delivering them to the subsystems are authorized to explain briefly the thinking or evidence behind points in the hypothesis when the receiving subsystem considers and states that they are unclear or that the Members would like to have repetition or clarification of the hypothesis. Still, this verbal transmission of working hypotheses is not consultative work, which remains the domain of the Consultants, <u>to whom the Members should be consistently referred at the end of each hypothesis delivered</u>.

Delivery of working hypotheses is a concrete manifestation of Management's commitment to public management; it represents task facilitation, not charity, generosity, or largesse. Management delivers its hypotheses to Consultants and to <u>all</u> legitimate Member subsystems. Hypotheses are not transmitted to Member subsystems met in spaces not authorized for use during the ISE. If multiple members of Management are to deliver the current hypothesis, the Director typically indicates to which subsystems each delivers the hypothesis, so that none is omitted or doubly addressed.

Boundary crossing in order to deliver Management's hypotheses may be done in various ways. Because the Member are likely not to have participated in the ISE before, the difficulties imagined and real around entry to Members' spaces are likely to derive from Managers' system-in-the-mind.

If the manager delivering a hypothesis is greeted with bureaucracy or irrational questions about provenance, he or she may simply ask about the reasons for the questions, inasmuch as all relevant information about Management's and Consultants' tasks, functions, and level of authorization are already fully public. Other members of Management may prefer to proactively state their task without preamble ("Hello, I have a message from Management, which I will now read for you.") upon entering the space, whether after knocking on a closed door and then immediately opening it or after entering a space whose door is already open. Consultants usually do not face these kinds of dilemma because their services are in most instances requested by Member subsystems.

When delivering a hypothesis, the member of Management may or may not knock on the Member subsystem door, if it is closed. If it is not closed, the member of Management may enter and state her or his purpose: to deliver working hypotheses to all ISE subsystems, without omission that could cause isolation. After the member of Management has knocked on a closed door, the door may be opened, the task promptly and briefly stated, and the hypothesis read aloud once. After the first reading, the Manager delivering it asks if the gathered wish or need to hear it yet a

second time. If so, the hypothesis is again read in its entirety and preferably verbatim, and the Manager retires from the Members' work space, often with some expression of gratitude. As mentioned, hypotheses are not delivered to unauthorized or vacant work spaces.

Member subsystems not wishing to hear the hypotheses from Management are acting out a rejection of the primary task of the ISE. Neither Members nor Managers nor Consultants are optional, dismissible elements in the institution being studied. Emotions *(as resistances)*, however strongly expressed are justified, do not change the primary institutional task, which Management is responsible for ensuring.

Management manages the entire conference system and its task via working hypotheses. Therefore, Management's allegiance is to the entire system. Members may or may not wish to hear the hypotheses delivered...but their wishes are independent of and not determinant of Management's task and method of task performance.

A Manager delivering hypotheses can answer Members' or Consultants' questions about them and may repeat them once or if long or complicated, two times, at the plenipotentiary's discretion. Reading the hypothesis is preferred, in order to standardize the information distributed to the total system by different members of Management. Because this act of delivery of hypotheses inevitably speaks to the political relatedness extending in both directions between Members and Management, it is meaningful and significantly so. The behaviors involved should retain a transparent and professional character and be narrowly task-oriented.

When managers deliver a working hypothesis to Member subsystems, they are secondarily able and free to obtain and mentally note visible data [number and gender of people in room, door opened or closed, obvious gender or other disparities, utilization of the space (blackboard, for example), mood, etc.] for later relay to the full Management team and for service in the subsequent construction or refinement of working hypotheses. All public, verbal, visible behaviors or statements are considered to not be confidential or even private and are therefore shareable.

Each hypothesis contains a requisite "because clause," referring to the gains or evasions consciously or unconsciously accomplished by the activities, behaviors, or sentiments that are outlined in the hypothesis. Frequently, the behaviors documented in the hypotheses function to block transformation and the associated pain and discomfort of learning via experience. To make patent its rationale and to ease its acceptance, each working hypothesis presents relevant supporting conference-life data, largely from the here-and-now behaviors of the system and more tangentially from previous here-and-now conference events such as the large or small study systems.

Every working hypothesis contains some of the data that led to its formulation. The supporting data are specific, although Members or staff are not in most cases referred to individually by name. Data used should be plentiful, substantive, and from various (two or three) vectors of the institution.

The predominant system-in-the-mind can be regarded, in some instances, as the "because clause." For example, "Members are avoiding contact, communication, and interactions with Management. Why? Because the system held in the mind is of managers as unapproachable, cruel, distant, unattractive, and uncaring functionaries, and encounter with the real managers of this institution risks transformation of yet unstated systems-in-the-mind."

The "because clause" may address directly Members' preferential interpretations of the institution's behaviors, especially the resistances, defenses, and impulses associated with their relatedness to Management, which are ideally made explicit in the working hypotheses.

At the conclusion of every working hypothesis or transformation (owing to new or more data, for example) of a working hypothesis transmitted to the Members, Management includes a direct authorization for them to work with the Consultants to develop the current hypothesis or other hypotheses about their relatedness to Management in the conference system as a whole. "Management encourages Members to utilize the services of Consultants to further explore this hypothesis and to publicly present elaborations or data-supported alternatives or clarifications."

Or, more simply, "Management remains open for discussion of this hypothesis and urges Members to utilize the services of the Consultants to further explore this hypothesis or others."

This suggestion to appeal to the Consultants is an <u>integral</u> part of the delivered hypothesis and is included in every presentation or reading of the hypothesis, including in repetitions of the hypothesis made in response to Members' petition.

Each member of Management can <u>always</u> remember that it is permissible to seek clarification in public from another member of Management, including the conference Director or Associate Director, if uncertain about any procedure or policy during the ISE. The event and its management are effective de facto instances of sharing management in public.

Content and format of working hypotheses: Verbatim examples

Examples of working hypotheses, two long (from the USA) and one short (from France), follow.

Example 1:
> "The Institutional System is faced, in the here-and-now, with a collective show of mime or imitation, manifest in the reproduction of unexamined, feared rites and fantasied 'toxic' emotions, which seem to be parodied or distorted versions of management's behaviors and emotions.

> "This mime, which is both silent and vocal, visible and invisible, obscures Members' self-protective adversarial political and spiritual sense of relatedness to Management.

> "Why this dark, back-and-forth show?

> "Because by avoiding the illumination possible through the learning carried out in the possibly 'black' process or box of transformation, one can avoid the pain of the birth trauma, of being born, of "seeing the light," or even of being 'born again.'

> "Data for this working hypothesis come from the Small Study Systems, the Large Study System, and the ISE itself, where, for example

> "Only minutes after Management heard this hypothesis, two female member delegates arrive to inform and assure conference management that their subsystem is operating to 'protect' and 'repair' those conference members who have, up to now, been 'injured' or 'infected' by the often painful experience of transformation, so that when the conference ends, those protected members, in accord with their own and others' wishes, may leave this system and return to safe havens, without being 'changed' or transformed in any real way by their experiences here.

> "The 'first-aid' behaviors of the conference 'nurses' seem to support the validity of the working hypothesis of mime as a safer substitute for engagement and transformation.

> "Further supporting data include the closely imitated or pirated copies of dynamics and efforts allied to management's own, now replicated in the fundamental aims of member-formed subsystems: diversity training managed partly by the 'foreign-born,' reparation, communication, conflict awareness, ambiguity, 'Others,' perplexing boundary management (*all are names or themes of subsystems formed during the current ISE*).

> "Management remains available to discuss the hypothesis and encourages Members to work with the consultants to explore and develop this or other hypotheses to understand the institution's current dynamics and behaviors."

Example 2:
> (From a GR conference whose theme was "racial diversity and authority":

> "Today, in the here and now, the institution created and studied in the ISE seeks to avoid the encounter with the 'Other' and to avoid the innovation and transformation possible or likely through this encounter. In this case, the Other is identified as the other subsystems and especially as the diversity within the subsystems of the ISE.

"The avoidance is carried out through separation and segregation,which may sound familiar here in Mississippi.

"This working hypothesis is based on data from the ISE, which include: the recurring removal, from the Members' lounge, of access to the up-to-date presentation and confirmation of diversity, symbolized in the daily newspaper. Additionally, the institution's members steer away from a genuine public encounter with management by creating in its stead a web page on which to leave anonymous messages or to 'browse' passively and non-interactively from the safety and privacy of one's own computer.

"Additional supporting data for this working hypothesis include:

a) the fact that management knows of no encounter between or among the subsystems, within the intersystem meeting spaces designated

b) the apparently nonrandom arrangement of the subsystems created by conference members

> in Room 101, the room with the smallest number: the youngest, the innocent, and the still unintroduced "foreign" conference members
> in Room 105: the members who seek to obliterate their diversity by defining themselves through uniformity or commonality (all are self-described Roman Catholics)
> in Room 108: the subsystem characterizing itself as an 'equality of hierarchy,' which appears to mean, in clearer terms, the denial or obliteration of hierarchy or political differentiation and power
> in Room 200: a 'union of understanding' that seeks to impose equality through a non-interactive management or government
> in Room 201: a subsystem fleeing from diversity through an 'indifference to differences' or an unexamined blanket tolerance for ambiguity, so that no manifestation of difference or diversity need be noted, defined, acknowledged, or explored
> in Room 220, the room with the largest number: the older, experienced parts of conference diversity, here as an island not clearly connected to the continent. It is the counterpart to the subsystem in Room 101 and perhaps for this reason is located in the territory numerically and physically farthest removed from Room 101.
> And, in the vacant Room 206: perhaps the isolated, un-encountered, untouched, unknown, and excluded invisible diversities and elements of desire and transformation.

"In parallel form, and reflecting the same pervasive organizational dynamics within management, one male and one female member of management (perhaps representing the sexual pairing needed for all creation) refuse to communicate this working hypothesis to members, inasmuch as to do so would introduce clearly terrifying innovation, hybridization, or transformation to their previous and habitual ISE management experience, that is, to their ISE system-in-the-mind.

"Why?

"Because encounter implies initiating a process of 'messing up' long-held, comfortable conceptions of a simpler past, when things were 'black and white.'

"In order to use sterile repetition and political habit to protect and keep at a distance the possibility of transformation occasioned by encounter, intermingling, interbreeding, and integration with diversity.

"Because transformation may be equated in the mind with growing 'uppity' or an 'out of line' mentality, awakening a terror that embarrassment, shame, or even violence could be consequent to learning in this multiracial institutional context.

"Management remains available for discussion of the hypothesis and encourages Members to work with the consultants to explore and develop this or other hypotheses to understand and explain the institution's current behaviors."

Example 3:
"Conference management has noted during the ISE the creation of an institution where the notion of management in public has provoked profound shock. Two examples:

a) About ⅔ of the participants have wanted to see public management directly (through a large number of observers who 'audit' management) or through transactions urging a treatment or cure for management, which, during the ISE, operates in public. The question afloat appears to be: "Is Management out of their minds?"

b) About ⅓ of the Members explicitly reject the very idea of management in public by refusing any transaction with management and in going so far as to occupy spaces that are not designated work spaces for this conference event.

"Could this be because of an emergence or stranglehold of the "family" model of management, which associates public management with entry into the parents' bedroom?

"This institution is not a family!

"Note: Just after management's elaboration of this working hypothesis, Members' first and only verbal interaction with management dealt with obtaining conference members' dates of birth, in order to celebrate the birthdays of conference 'family' members.

"Management recommends the use of the consultants to examine this working hypothesis."

Communications sent by Management need not always be so detailed and lengthy. At a minimum, they require statement of the working hypothesis, presentation of conference data that seem to support the reasoning or logic of the hypothesis, positing and clarifying a "because clause," and referral to the Consultants for collaboration. Likewise, in Consultants' work with Member subsystems, referral back to Management for further development and sharing of working hypotheses is essential.

Adherence to the stated ISE task boundaries during the "breaks"

The use of management in public has wide-reaching implications and effects during the ISE. All Management work that involves crossing boundaries (between or among teams or subsystems, for example) is done in public within the announced time boundaries of the ISE sessions, so that conversely, no Management work is done in private during the ISE. During the "breaks," clarifying a working hypothesis in one's own mind, through thinking or writing, is perhaps acceptable. Generally, work between Consultants and Management or among consultants or managers is not.

"Breaks" in the schedule are basically considered private times and Management work on here-and-now events is completely suspended during them. Staff's work on other reflective events that may be intervening (application or role analysis subsysytems that meet during the ISE schedule, for example) remains acceptable. No staff meetings or reports (unless later made public) are carried out during the ISE; they are postponed until its conclusion, ensuring that the ISE remains a public, here-and-now learning opportunity.

Within-team work during the "breaks" is a gray area: some consider it acceptable (for example, for the Director and Associate Director to clarify their thinking about working hypotheses in general by talking together during the "breaks"), while others do not (preferring, for example, that no here-and-now collaboration whatsoever be carried out on "breaks"). Whatever the origin or intentions of inter-team or intra-team work actually done during the "breaks," the results are properly shared, in public, with the remainder of the Management team as well as with any present observing Members in the Management's territory when the subsequent ISE session begins.

Reports from the administrative team, related to happenings on the Member/Management boundaries, are always admitted and given in public <u>during</u> the ISE sessions. Staff interactions during the breaks (including mealtimes) remain social, and do not broach ISE-related content. The "breaks" during the ISE may be shorter than during other conference events, precisely because no Management work (such as review of small or large study system sessions) is performed during them.

Because staff meetings or reports (unless subsequently made public and thereby converting precious moments of the ISE into a there-and-then event and giving the lie to the Director's assurance that the ISE is a here-and-now event) are not carried out during the ISE, an interspersed design (with, for example, a small study system meeting at some point during the ISE) is probably contraindicated. The brevity of the ISE during a weekend conference argues against an interspersed design. If such a design is utilized, however, work on any interspersed here-and-now event is only carried out in public during the ISE sessions, with careful attention to its potential for distraction, diversion, or destruction of the ISE's proper tasks and focus.

As a matter of course and of protocol consistent with the Director's remarks during the ISE opening plenary, Managers and Consultants do not discuss ISE content, matters, events, behaviors, or dynamics during the scheduled "breaks" occurring throughout the event. Members, of course, are not bound by this convention, but in the ISE opening plenary, they are informed that Management and Consultants will abide by it. This maintenance of task and temporal boundaries is vital to the integrity of the ISE and to the Members' and Management's availability for learning from and through shared, public experience.

Management in public can permit transformation of Members' defensive systems-in-the-mind. In contrast, Management that meets surreptitiously in private, while proffering "management in public" as the standard procedure for the ISE, encourages Members' maintenance of defensive, irrational systems-in-the-mind. Such oblique behaviors by Managers or Consultants constitute counter-task acting out.

For staff members experienced in the IE, the transformations of the ISE (such as the limitation on intra- or cross-team staff work during the ISE) may stir resistances precisely to learning from novel or transformed structures or innovations. These resistances create and reinforce similar defenses in the Members during the ISE, an example of detrimental "leadership." Management's addressing these resistances, as in all conference moments, is essential and determinant if Member learning is to proceed without blockage by Members' and Consultants' half-heartedness and without unnecessary procedural confusion. All Managers and Consultants share equal responsibility for assuring adherence to procedural guidelines that have been publicized (i. e., excluding ISE work from the "breaks" during the ISE.

Not surprisingly, Management's and/or Consultants' deskilling of themselves in the face of the challenging opportunity for novel learning presented by the ISE's innovative rendering of IE or IG tasks may act as a major resistance to their own and Members' learning. In spite of adequate familiarity with system-as-a-whole conceptualization and intervention, Consultants and Managers sometimes feel unprepared to engage solitarily in competent applied system-level interpretation or intervention because as such, they are more than elsewhere or otherwise constrained to include their own psychodynamics, roles, and behaviors in publicly rendering or tendering hypotheses about the system's character.

Deskilling can indicate dependent or counter-dependent resistance ("What do I do now?" "I don't understand." or "The old way is better.") to something new, unexpected, surprising, or shocking. When dealt with directly, the resistance behind Managers' or Consultants' deskilling becomes a source of energy that can enable and power their own and Members' learning during the ISE.

Administration of the boundaries to Management's physical work space

A member of the administrative team is often, though not necessarily, charged with managing the boundary to Management's public work space. The person charged may or may not be the director of the administrative team, according to Management's decision. If the administrative team is composed of more than one member, the role of boundary manager may rotate among the team members. All members of the administrative team may be asked to take responsibility for boundary management during the ISE. In some ISE designs, two administrators are deployed on

the boundary: one interacts verbally with the Members who come to the boundary, while the other notes on a flip chart or blackboard the visiting representatives' names (including those of Consultants, with whom verbal interaction at the boundary is not necessary or required), the subsystems that they serve, their levels of authorization, and other pertinent data.

During the process of delivering working hypotheses to all ISE subsystems, in which most of the members of Management participate in order to prevent delay in transmitting the hypotheses to all subsystems, a member of Management who does not belong to the administrative team may be appointed by the Director to temporarily manage the physical boundaries to Management's public work space.

Members' arrivals at, entry to, and interactions within Management's work space are not minor or secondary encounters for the boundary managers. They should not be treated perfunctorily or as undesirable distractions, but rather as essential sociotechnical transactions and a primary responsibility of Management. That this is so should be evident to the Members, who should not have to wait unnecessarily to be seen or acknowledged by the member(s) of Management attending the boundary. Thus, the distance between the boundary manager's position or chair and the door must be rational (i. e., task-determined) and favorable to opportune performance of the Managers' task. The boundary manager must consider the decision of whether to sit or stand in the anticipation or performance of this task. Civility and courtesy are welcoming; common greetings ("Hello" or "Good afternoon") are in order, and, in a minor way, distinguish the ISE from other conference here-and-now events.

Requesting the names of Members when they come to management's or the consultants' territory is not done in cases where management's boundary manager or the consultants' boundary manager already knows the Member's name. Not knowing the Members' names reflects the quality of the political, physical, spiritual, and psychic relatedness between Members and management, who has recruited and negotiated their passage across the conference boundary. The ISE is an open system, and its participants are known and have agreed to participate. The Members' supposed or invented anonymity, which is unreal, at the subsystems' boundaries is sometimes desired as a subtle defense against "knowing" what is going on in the institution. Anonymity is an abstraction, while the tasks of the ISE deal with real, nameable people and events, whether Members or staff members.

Thus, games are out of place: for example, asking a Member's name or other information that the boundary manager already knows. But, composition of subsystems may have changed or the Member at the boundary may have joined another subsystem or some Members may have dropped out of (or joined) a given subsystem or may have different levels of authorization from those previously held. In these cases, the boundary manager's "known" information is out-of-date, and thus no longer here-and-now. The boundary manager should obtain the information that the representative is able to give; being unable to give all the requested information is not meant to be a barrier to her or his entry. Even if unanswerable, the questions asked may by themselves provoke thought or avenues for exploration and learning within the subsystem represented.

Management (through its boundary managers) requests data from all Members who come to its territory. Boundary managers keep in mind that transactions with Members are not simply bureaucratic, cut-and-dried, rote means to an end (namely, entry into Management's space). Rather, they are significant sociotechnical transactions and sources of relevant and new learning for Members and Managers. Crossing physical boundaries is, in the conference context, deliberate, and it is essential to create favorable conditions for learning around this regularly anxiety-laden and sometimes misunderstood or undervalued activity.

The boundary manager requests and notes in legible form the following data from all Members who come to Management's territory and who are observers, delegates, or plenipotentiaries:
1. time of arrival
2. name(s)
3. role that representative is authorized to enact
4. room number of subsystem represented
5. name of subsystem represented, if any
6. number of Members in the subsystem represented

7. task or purpose in coming or nature of any request (asked only of delegates and plenipotentiaries)

In the case of Consultants coming to Management's public space, only items 1 and 2 are documented, and these without verbal verification.

Items 4, 5, and 6 (as well as any hypotheses formulated during the current ISE session) are traditionally printed out in log form during the following break, with copies given to all Management members and Consultants at the beginning of the subsequent ISE session. Some conference directors find it valuable to have an updated map (Appendix 1) of the Members' subsystems, showing their locations, names, and composition. The decision is the Director's and is based on the perceived usefulness of such information in the elaboration of working hypotheses. All written information provided to Management is logically also provided to the single Member choosing to function as part of Management for the current ISE session, whenever such participation is included in the ISE design.

Observers (who remain silent) are without exception freely admitted to Management's space, after data 1 – 5 are obtained from them at the boundary. Delegates and plenipotentiaries must state their purpose in more detail to the boundary manager and may be afterward ushered directly to the two seats available for verbal transactions with Management, if those seats are vacant. Their being seated does not guarantee immediate verbal attention from Management, but it is a signal to managers that there are pending exchanges with Members.

The Director, as in all cases of multiple tasks calling at a single time (i. e., a situation requiring management of self in role) must extemporaneously discern the advisability of proceeding in one direction (the Members) or another (current Management engagements). In general, here-and-now verbal interactions with Members take precedence.

If there are more than two delegates or plenipotentiaries from a single subsystem, the boundary manager simply indicates that a maximum of two spaces are available and that the Members may decide in the hallway outside Management's work space which two will take the seats. Within any single period of interaction with Management, no rotation of seating among Members from the same subsystem is permitted.

If all the seats set aside for observers, and delegates or plenipotentiaries waiting to verbally interact with Management are occupied, Members approaching the Management boundary space are asked to return at a later time, when the seats may become available. If only the two seats set aside for those interacting verbally with Management are already occupied, arriving Member delegates or plenipotentiaries are presented with two options: they may stay outside Management's space until the seats are vacated or they may enter and wait in the seats commonly reserved for observers. If they choose the latter option, Management's boundary manager verbally makes it clear and explicit that they temporarily enter Management's space exclusively as <u>silent</u> observers, remaining in that silent observer role until such time as they are seated in the two chairs facing Management, at which point they resume their authorized delegate or plenipotentiary roles. An attempt should be made to obtain verbal acknowledgment of this condition for entry: "Do you understand and accept this condition of entry?"

In other words, Members observing or waiting to interact face-to-face with Management are admitted <u>only</u> as silent observers, regardless of the level of authorization granted by the Member subsystem that they represent. The boundary manager(s) and other members of Management, whether part of the administrative team or not, are responsible for maintaining silence among the seated observers. They take charge, whenever necessary, of keeping order among those waiting and/or expel Members who insist on speaking in spite of their acknowledged role as silent observers. Every necessary request for silence should be verbal, audible to all present, public, immediate or timely, unambiguous, and effective.

Delegates and plenipotentiaries may make an appointment for transacting affairs with Management at a later time or for a different session, but the boundary manager advises them that if, at the appointed time, managers are in the midst of a verbal transaction with another Member subsystem representative, they will attend to the previously scheduled appointment only when the ongoing transaction is finished, even if that means crossing over a time boundary set for the beginning of the scheduled appointment. If Members inquire about scheduling a

rendezvous, Management's boundary manager can make clear at that point that it is possible and under what conditions. The conference Director may choose not to offer Members this option until and unless they request it.

Consultants may enter Management's space with minimal or no procedural formalities at the boundary. They utilize one or both of the two seats facing Management's work table, if these are unoccupied. If the two seats for those conducting verbal transactions with Management are occupied, then another manager, previously or spontaneously decided and charged, is responsible for taking the Consultant(s) aside (an additional 2-3 chairs may be appropriate, located somewhat behind Management's seats at the work table) and for there carrying out the transaction for speedy subsequent relay to the total Management body. If, however, the Director or another member of Management wishes or "needs" to interact with the Consultants' representative, the latter may be asked to wait until the two occupied seats become available for such interaction.

If Management is busy in a transaction with Members, the Director asks one of her or his manager colleagues, though generally not those directly engaged in the exchanges on the work space boundary, to meet with the Consultants' representative, inside Management's space. Usually, two or three chairs are separately deployed, in face-to-face position, for this purpose (intra, page 22). Thus, in the case of Consultants' entry into Management's work space, no formal verbal transaction occurs at the boundary.

Consultants and managers are understood to be colleagues working cooperatively together. Thus, the boundary-crossing processes in place must facilitate the former's access to Management. The verbal transaction typically carried out at the boundary to Management's work space is not done to annoy Members. Rather, it is one of the major ways through which Management learns about the system that it pretends to oversee. Requesting information about the Consultants who cross Management's boundaries is redundant and inefficient because the managers already know exactly the Consultants' representatives' identities, deployment, and purposes. Entry of Management members into Consultants' work space operate under similar protocol.

Consultants' delivery of services to Members during the ISE

During the ISE, the challenge for Consultants continues to be, as in other conference events, how to work so that Members can focus on and address the event's task. In order to succeed, the Consultants must be clear about the nature of both the institutional task and their own consulting objectives. Being clear about the answers to the questions of "What is being worked on here?" or "What is being worked out in these interactions with Management?" or "What is going on?" or "What is being worked out?" ("C'est quoi à l'oeuvre?") can provide an initial entry into the heart of the matter. Of significant usefulness is the Consultant's ability to work from a base in her or his own experience to the Members' feelings or emotional responses to life in the institutional system under construction.

Likewise to the point is being aware not only of the different parts of the system, but also of the feelings that the different subsystems evoke, cause, or experience. Answering questions such as "How were you received by the Member subsystem?" or "What did you feel while consulting to the subsystem?" or "How could the termination of the consultation to the Members in this subsystem be characterized in psychic, political, and spiritual metaphors?" can be useful in clarifying the relatedness between Members and Management, with whom Consultants are sometimes confused.

The Consultants' task, therefore, is to provide information, perspectives, and strategies useful to Members in their performance and understanding of the study of their physical, psychic, political, and spiritual relatedness to Management, as manifestations of their systems-in-the-mind as well as of reality.

In the Director's opening remarks for the ISE, Members are informed that they may receive consultation in their space "upon request" (though not solely upon request) and that consultation is a desirable resource to utilize in addressing the event's complex experiential learning task. Consultants may decide to provide appropriate consulting services even without a direct or

explicit verbal request for consultation from a Member subsystem, but this is not usual procedure and is reserved for extraordinary circumstances or crises.*

During interactions, Members do not legitimately manage Consultants or Managers, with the latter's collusion or consent. Some members of Management do not knock to ask permission to enter Members' spaces; others do. Management's or Consultants' submitting to Member subsystem constraints *(defined as "implying the operation of restrictive force, leading to a strained, repressed or unnatural quality in that which results")* or interdiction *(implying "prohibition, usually for a limited time, to forestall unfavorable developments")*, however, is not necessarily expedient. Consultants are unlikely to find themselves in a position of doubt about their entry into Member's subsystems, to which ISE protocol usually requires that they be invited. But the crossing of this boundary, in either direction, is likely to elicit clear manifestations of active, dominant systems-in-the-mind.

In special cases, a consultant might enter a subsystem and simply ask, "May I, as a Consultant, be of some service to you in your working or method of working with Management's recent hypothesis?" Or, "What typologies or descriptions or 'systems-in-the-mind' have you discussed in your examination of your relatedness to Management and of your roles and behaviors within this institution? Are there responses inside you that you been surprised to find in your interactions with Management and with each other?" Or, "What are your subsystem's fantasies about your own and Management's roles in this institution?" Or, "Which 'systems-in-the-mind' influence your ways of exploring or exercising your authority and leadership in your real and fantasied interactions with Management?" "Have you explored how your interactions reflect relatedness?"

These same types of questions could as profitably be asked in the context of a Member-subsystem negotiation for consultation at the boundary to the Consultants' work space, although the proper and superior venue for in-depth consultation is public, within the Member subsystems or the inter-subsystem space.

As is obvious from these examples of practical approaches to engagement with Members, consultations during the ISE may be more proactive, proffered, interrogative, and direct than is the case during other here-and-now events, focused only on parts of the system as a whole (small or large study systems, for example). Even so, Management does not provide specific guidelines or instructions to Consultants about the how, when, or why of entering Member subsystem spaces for task-related purposes. To do so during the event would weaken Management's earlier full authorization of the Consultants' plenipotentiary role and lend validity to a system-in-the-mind that assumes that Management "manages" the Consultants.

Consultants make decisions about whether and for how long to be present in Members' subsystems, usually within broad guidelines set by the Convenor of the Consultants. They also respond to Members' requests for consultation in order to clarify, amend, extend, or transform Management's and Members' hypotheses about the physical, psychic, spiritual, and political aspects of their relatedness.

The Consultants, through their work (both consultation and reflection or thought), support a focus on the managed system and facilitate its study. The principal avenue leading to this focus and study consists in system-level working hypotheses that Management develops. Management is a primary source for the initial formulation of working hypotheses, but Consultants and Members are equally authorized to elaborate or present to Management hypotheses about the total system's behaviors, unconscious motivations, conflicts, collusions, and/or operational tactics, whether perceived as healthy or pathological, constructive or obstructive. These hypotheses "reveal" the institution-as-a-whole and permit the transformation of the systems-in-the-mind that shape it.

The Consultants' task is to briefly accompany Members in exploring, understanding, and "fleshing out" the hypotheses publicly presented or available. In so doing, Members may learn about system-level behaviors in the here-and-now and may contribute, as responsible members of the institution, to its transformation, as needed or desired.

Consultants are responsible for collaborative and complementary work with Management in order to support the event's task and the conference aim of providing opportunities for learning. The ways in which the collaboration is realized are multiform, and its patterns are largely unknown before the event begins. In order to eliminate significant barriers to comprehension of the

Consultants' task and its distinction from the Managers' tasks, the Director must be explicit that Consultants, rather than Management, are responsible for consulting resources and activities with the Members during the ISE event. The division of labor and purpose between Management and Consultants is emphasized if Members are clearly, publicly, and repeatedly made aware (for example, through codicils to each consultation delivered and working hypothesis transmitted) of the tasks and purview assigned to each of the other subsystems in the ISE.

With ongoing care and analysis, Managers and Consultants may avoid unthinking or unintentional mirroring of system-as-a-whole dynamics that are the subject matter for study during the ISE. Active involvement in intentional institutional development or design has been termed "transformation" and more recently "Transformaction" by the thinkers at IFSI. In most respects, the efforts at revelation found in the working hypotheses supply basic energy for transformation of the institution-as-a-whole and its multiple systems-in-the-mind.

Time allocation and educational resource management

Time allocation for the ISE is the result of conference Management's decisions prior to the conference opening. One possible configuration of a block of time for the event (during a weekend GR conference schedule) might be the following, which allows 5 full ISE sessions:

1015 – 1030	Opening plenary – ISE
1030 – 1130	ISE 1
1130 – 1245	Lunch
1245 – 1345	ISE 2
1345 – 1400	Break
1400 – 1500	ISE 3
1500 – 1515	Break
1515 – 1615	ISE 4
1615 – 1630	Break
1630 – 1730	Closing plenary – ISE

The lack of a "break" between the ISE opening plenary and the first session of the event is due to the fact that the opening plenary is part and parcel of the creation of the ISE and is therefore not a disconnected event. The first closing time boundary marked (10:30 hours) is approximate. The time boundary that the Director observes to define her or his physical presence in the plenary room may be variable. At some point, he or she departs the plenary room, for continued work in Management's space.

Members do as they wish with regard to the amount of time they spend in the ISE opening plenary space, and the two Consultants present may work with them in their decision-making efforts, even without the Members' direct request for consultation. In this setting, the two Consultants do not simply take up management of the Members and their experience, where the Director left off. They work throughout the entire ISE in the Consultant role.

Members of Management and Consultants work only within the stated time boundaries for the sessions. The shortening of the "breaks" from the usual 30 minutes to 15 minutes intensifies the ISE experience.

Some Directors believe that a meal or a break overnight between the initial 35 – 50% of the ISE sessions and the remainder of them is beneficial to Members' and Consultants' absorption or understanding of the system-as-a-whole perspective. Sometimes there is evidence to suggest that such an interruption is beneficial; other times there is not.

At the beginning of the ISE, a single-sheet map showing the spaces (room numbers, floor, and disposition) allocated for it, with sufficient space to write in the names of Members convened in the territories and the possibly evolving names of resident subsystems, is distributed by the administrative team to Management for their system-as-a-whole work during the ISE. (Appendix 1).

As the map is continually revised, as updated information becomes available, pencils may be more suitable for writing than ball-point pens. The most recent version is photocopied, if possible, during the next following break and distributed by the administrative team to all

members of Management at the beginning of the following ISE session. At the same time, a copy of the updated map is shared with the Consultants. Once a working hypothesis has been developed, it, too, is distributed in printed form to the Managers and Consultants, at the beginning of the subsequent ISE session. The hypotheses may also or instead be written on a publicly visible blackboard or flip-chart in Management's work space.

Specific space requirements for the ISE

A.

One reasonably large space for Management, physically separate and distant from Consultants' space, both perhaps on the same floor of the building but certainly not adjoining. Ideally, Management space might be located on a different floor from the Consultants or separated from Consultants' space by 3 or more intervening rooms or a distance of about 75 linear feet or more.

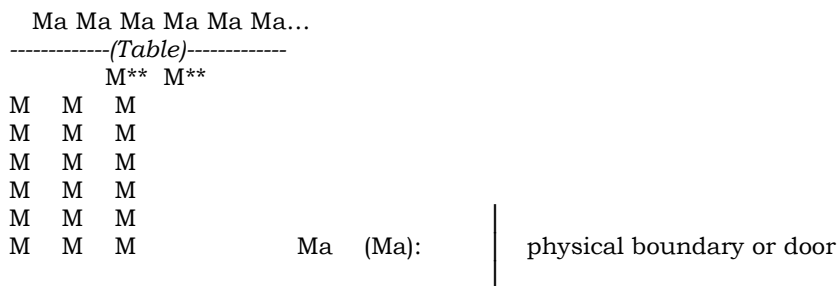The physical separation serves to underline the two functions of conference staff, management and consultation.

Ideally, the interior of Management's work space cannot be viewed through uncovered windows, which Members could use to circumvent the need to enter Management's work space by crossing the managed boundary in order to observe their public activities.

B.

One long table (or 2 joinable shorter tables) and chairs for Management (approximately 6 – 9 chairs for Director, Associate Director, Assistant Director for Administration, and administrative team members, 1 or more consultants with role(s) as member of Management solely for the duration of the ISE, 1 Member with temporary role as manager). Additionally, 2 chairs for Member or Consultant representatives to interact with Management, ± 15 chairs for observers and for delegates or plenipotentiaries waiting to interact with Management, and 2-3 chairs (the number is decided by the Director) for Management-Consultant interactions when such are expedient (for example, when full Management is otherwise occupied).

One possible general disposition for Management's space is indicated below; to some degree, the disposition utilized depends on spatial arrangements of the room assigned for Management's work.

(Ma   C) **or** (Ma   C   C) *occupied as needed*

```
   Ma Ma Ma Ma Ma Ma...
------------(Table)------------
         M**  M**
M    M    M
M    M    M
M    M    M
M    M    M
M    M    M
M    M    M              Ma    (Ma):   |   physical boundary or door
                                       |
```

Key: Manager = Ma, Member = M, Consultant = C.
** Or, C. These two seat are best considered seats for delegates and plenipotentiaries who are interacting with Management. Inasmuch as Consultants are plenipotentiaries, these seats, when not occupied by Member delegates or plenipotentiaries, are utilized by Consultants who are interacting with Management.

The location for the door and thus for the boundary manager(s) may vary, and they are taken into account in planning.

C.

One adequately large space for Consultants; chairs sufficient for seating all staff members working as consultants during the ISE. Aware of Management's design and

purpose for the ISE, Consultants as plenipotentiaries decide how to organize themselves in their space and how to work. Consultants are responsible for physically arranging their own assigned work space, which they do during the first minutes of the ISE opening plenary. In case of need, the Consultants, via a request to Management, may enlist the administrative team's help to obtain any missing but required material resources. Management manages physical resources during the ISE.

Inside their work space, Consultants do not accept Members as observers of their work or as delegates or plenipotentiaries, so no chairs are present for their use. On the other hand, members of Management (including Members temporarily participating in Management) are allowed to enter the Consultants' work space whenever they are dispatched by Management.

Members, as mentioned, are never invited or admitted to the Consultants' work space; instead, they negotiate for the services of a Consultant outside the threshold of the Consultants' territory. Normally, the Consultants leave open the door to their work space, in order to signify that they are permanently ready to welcome Members' requests. As is also Management's practice, the Consultants open their door punctually at each session's beginning time boundary and close it punctually at the end of each session of the ISE.

Ideally, the interior of the Consultants' work space cannot be viewed through uncovered windows, which Members could use to observe their activities.

D.

The number of spaces for Member-formed subsystems is equal to one less **or** one more than the number of small study systems provided for in the conference design, which may depend on the total size of conference membership and on the physical resources available. Chairs in spaces for Member-formed subsystems are provided by administrative team members but are not <u>arranged</u> in any way by Management. The total number of chairs provided by Management should be no less than the total number of Members plus the number of Consultants minus 1 (1 representing the Convenor of the Consultants). The total number of chairs distributed throughout the spaces for Member-formed subsystems may be several or quite a few more than the number of Members in the conference (i. e., extras are permitted). The chairs may be stacked in groups of 3-5 chairs, if stackable, or otherwise left in a random arrangement.

E.

One adequately large space for the **opening** ISE plenary, together with an appropriate number of chairs (1 for each Member, 1 for the Director, 2 for Consultants). This same space is frequently also used for inter-subsystem meetings and for the ISE closing plenary.

Each subsystem (Management, Consultants, and Members) is generally responsible for the arrangement of their seating, except during the ISE opening plenary for which Management may arrange Members' chairs. Management and Consultants arrange their own seating during the "break" <u>prior to</u> the beginning of each ISE plenary.

In the ISE **opening** plenary space, Members' chairs (exactly 1 for each Member) may be arranged, as desired by the Director. Management's chair (only the conference Director is present) is arranged by Management; two Consultants' chairs are set up by Consultants. The two consultants are not seated in the same geography as Management, reflecting the distinct tasks and perspectives of the two staff subsystems.

In summary, in the **opening** plenary space,
- ✓ Members' chairs may be arranged (<u>intra</u>, p. 9, for one possibility)
- ✓ the Director's chair is arranged by the Director or, at his or her request, by another member of Management
- ✓ two Consultants arrange their chairs elsewhere than very near or beside or behind the Director

F.

One space to be used for Member-originated <u>inter-subsystem</u> meetings during the ISE, which Members may hold with or without a consultant's services. Normally, this space is the same room used for opening and closing plenaries of the event. The subsystems involved may solicit consultation and/or Management's assistance with use of this resource before the meeting takes place. However, Members do not have to request use of the space from Management. They may ask for 1 (rarely 2) Consultants to inter-subsystem meetings if they wish; it is encouraged by Management.

G.

One adequately large space for the **closing** ISE plenary, together with an appropriate number of chairs (1 for each Member, 1 for each consultant, 1 for each member of Management).

In the ISE **closing** plenary space, Members' chairs are not arranged, but are available in random groupings. Members may arrange their chairs as they enter the plenary space. Management's chairs are arranged by Management; Consultants' chairs are set up by Consultants. Consultants are not seated together with nor in the same geography as Management, reflecting the distinct procedures and functions of the two staff subsystems during the ISE, which does not end until this plenary's closing time boundary.

In summary, in the **closing** plenary space,
- ✓ Members' chairs are not arranged, but are available in random groups or stacked in small groups (distributed by the administrative team according to the Director's instructions)
- ✓ Management's chairs are arranged by Management and all members of Management are present
- ✓ Consultants' chairs are arranged by Consultants; all Consultants are present at the <u>closing</u> plenary
- ✓ Consultants are not seated in the same arrangement or identical geography as Management
- ✓ Managers are present in the role of Manager; Consultants are present in the Consultant role. They do not function as unified or undifferentiated members of "staff."

The ISE closing plenary

The closing plenary of the ISE, unlike other conference plenaries, is a here-and-now event, not a purely reflective exercise. It is not a review or there-and-then event. All Consultants are present, collectively deciding their own location during this closing plenary. The Director makes the Consultants aware of the here-and-now nature of the event in advance of its beginning.

Revelation and transformation, but not reparation or primitive salvation or damnation, are the essence of Management's and Consultants' work during the ISE. Transformation may be considered the "output" of the system, while the "throughput" is engagement with primary process, "black box" functioning, both individual and institutional. The "input" is revelation and especially revelation through interpretation via working hypotheses.

_____

* For example, in 1986, Dr. Eric Miller, without being asked and without knocking or otherwise asking permission to enter, came into the ISE member subsystem self-named "Foreigners" at the annual Leicester conference (Shields, 1986). To the subsystem members' surprise, he came unasked presumably because Management was aware that no other ISE member subsystem had permitted the Foreigners to interact with them in their own space, and during four ISE sessions none had ever come to the boundary of the Foreigners' space. These facts, however, had not been verbally communicated to Management by the members of the Foreigners' group. The consequences of the unsolicited consultation were quite (appropriately, in the Foreigners' view) violent and effectively stimulated system transformation.

References

Shields, W. (1986).   A Massachusetts Yankee in Leicester, England: Experiences at Tavistock
    international group relations conference, an application: Tripoli, April 1986. Northeastern
    Society for Group Psychotherapy Newsletter, <u>VIII</u>(3):1-4.
<u>Webster's New World Dictionary</u>. (1991). 3rd College Edition. New York: Simon & Schuster, Inc.

Revisions and/or annotations made:
        12 December 2015
        7 February 2014
        3 March 2013
        17 January 2010
        16 September 2009
        22 December 2008
        30 November 2008
            México, Distrito Federal
            Berlin, Germany
            Hilo, Hawaii

Appendix 1

Map of ISE Member subsystems' spaces, names, and composition

(Territory)	*(Territory)*	*(Territory)*	*(Territory)*
(Subsystem)	*(Subsystem)*	*(Subsystem)*	*(Subsystem)*
(Members)	*(Members)*	*(Members)*	*(Members)*
(Territory)	*(Territory)*	*(Territory)*	*(Territory)*
(Subsystem)	*(Subsystem)*	*(Subsystem)*	*(Subsystem)*
(Members)	*(Members)*	*(Members)*	*(Members)*
Inter-subsystem meeting territory			

Appendix 2

Outline of information contained and conveyed in the Director's remarks
in the Opening Plenary of the ISE

1.

I open the Institutional System Event in my role as Director of the Conference.

The Conference is sponsored by _____, which has named me as Director.

The entire staff, which I have recruited, has confirmed me in this role.

2.

_____ and _____ are present here in the role of Consultants.

3.

Up to now, you have had a number of experiences in different types of here-and-now events. The make-up of the subsystems in which you have participated in these events has been decided by the conference staff, on the basis of information that you have provided and/or that it possesses.

4.

Likewise, in the working sessions up to now, the Members have related to staff members
• sometimes in its Consultant role, during the here-and-now sessions (small study systems, large study system), and
• sometimes in its Management role, during the registration and the plenary session(s).

Now, in the ISE, you have the possibility of collaborating with staff members in both their **Consultant** and **Management** roles.

5.

The **aim** of the ISE is to acquire the experience of **being** in an institution, and, among other things:

• to furnish opportunities for Members to form subsystems of their own choice, according, we hope, to criteria that you define and decide. You could also choose to divide yourselves up **randomly**. It is your choice.

• to supply you with opportunities to manage yourselves in your roles, which are related to the primary task of the ISE, which in turn is tied to the primary experiential learning task of the Conference.

• to furnish opportunities to experience active (or not) leadership and followership.

• to exercise authority in the name of the subsystems that you will create according to what you consider best suits you and your task.

For these purposes, I want to inform the Members that it is possible to make a differentiation among 3 levels of representative authority:

- **Observer**: The Observer comes to observe, silently, but he or she is charged with gathering information for his or her subsystem and with reporting that information back to the subsystem.

- **Delegate**:This representative is charged with carrying out negotiations on a previously specified point. That is the mandate. When he or she departs to perform the interactions authorized and required for the task, the Delegate has full authority to negotiate only on the point specified by the authorizing subsystem. It is understood that she or he reports back to the subsystem.

- **Plenipotentiary**: This representative has full authority to negotiate in the name of his or her subsystem the issues and courses of action that he or she judges appropriate in order to attain the subsystem's stated fundamental objective.

I want to make it clear that these are not rules, but rather options that are available for **Members'** use, or not.
In any case, they are differentiations that we as **Management** use and will use.
The Consultants have indicated that they will recognize the same 3 levels of representative authority.

6.
At this very moment, this institution does not exist except in the mind or spirit of each one of us.
The **form** that this institution will take is open for exploration, discovery, and transaction.
It is probable that each one of you has different ideas about what this institution should be or should become. In fact, it is probable that each of you has different ideas about this institution's voyage of **transformation**, which we are now beginning.

7.
Furthermore, the experience of **being** ("to be or not to be" from HAMLET) in an institution can also provide you with opportunities to work on the transformation of roles, interactions, and systems.

8.
Thus, the primary task before us all is:

To explore the nature of the relatedness between Members and Management of the ISE.

In this, we are dealing with the fundamental "operational" task, knowing that the fundamental existential task consists in **studying the mental representations or systems-in-the-mind that give rise to this institution in the course of its evolution.**

9.

What aspects of relatedness can one find to study?
Three main dimensions: political, psychic, and spiritual.

10.

In regard to these dimensions, the essential question is this:
What is the difference between what exists "in the mind" and what exists in reality?
And this question of differentiation applies to each of the dimensions mentioned.

11.

I have spoken of the 2 components of staff: **Management** and **Consultants**.

For the ISE, staff members take up either of two roles: that of Management or that of Consultant. Both roles are carried out by different elements of the staff, and each role has distinct tasks.

12.

Management is directed by myself, and includes the coordination of resources, handled by the Administrative team, directed by _____.

13.

The staff members, according to their differentiated roles (Manager or Consultant), are located in separate spaces: Room _____ (for Management) and Room _____ (for the Consultants).

14.

Speaking for the Consultants, I can tell you that their politics are to furnish consultation upon reasonable request.

15.

Moreover, speaking for Management, I can say that our politics are to **work in public**.
We are permanently open for observation and dialogue, and we will work with the representatives of the Members' subsystems <u>at any and every point during the ISE sessions</u>. Management and Consultants do not carry out ISE work during the "breaks," that is, outside of the time boundaries of the ISE event's sessions.

16.

Additionally, "management in public" implies, as much as is possible, a **shared management**. This means that Members may take part in the Management of the ISE.

More precisely:

1. With the exception of the two ISE plenaries, **for each session of the ISE and for the duration of each session**, a single seat within Management will be reserved for one Member.

2. This possibility will be offered only during the first 5 minutes of each session, *on a first-come, first-served basis.*

3. The Member wishing to join Management for a single session has only to indicate the role that he or she wishes to take up (that is, member of Management) to one of Management's boundary managers. He or she may then join Management for a single ISE session without the need for any further verbal transaction at Management's boundary.

4. Each Member is allowed to join Management for only one session of the ISE.

17.

• **Territories** available during the ISE:

For Members' work in the subsystems that you design, _____ (*total number*) working spaces are available. These are: _____, _____, _____, _____, etc.

>   Room _____, this room, is reserved exclusively for inter-subsystem and plenary meetings

>   Room _____ is Management's work space

>   Room _____ is the Consultants' work space

• **Time**: As outlined in the printed program (_____ [*number*] of sessions, including this one)

18.

Are there any questions?

19.

I repeat: ***TASK***

      TIME (_____ [*number*] of sessions)

      TERRITORIES (_____ [*total number*] of work spaces, Management's work space, Consultants' work space, and a plenary and inter-subsystem work space).

20.

Management's recommendation is that you use the services of the Consultants here present to assist you now in the formation of the subsystems of your choice.

Appendix 3

Outline of information contained and conveyed in the Director's remarks
in the Closing Plenary of the ISE

1.

I open this event's closing plenary in my role as Director of the Institutional System Event, which is part of my role as Director of the Conference.

2.

My colleagues here (hand movement to indicate Management) constitute together with me the **Management** of the ISE.

3.

Some of my colleagues have had the experience of being **Consultants** in the course of the preceding _____ (*number*) sessions of the ISE and they are here, still in their role as Consultants.

4.

I remind you of the **primary task of the ISE**, which is

> *To explore the nature of the physical, psychic, political, and spiritual aspects of the relatedness between the Members and Management of the ISE.*

In this, we are dealing with the fundamental "operational" task, knowing that the fundamental existential task consists in **studying the mental representations or systems-in-the-mind that give rise to this institution in the course of its evolution.**

5.

From the beginning of the ISE, today at _____ hours, an institution has been created, developed, and will end today at _____ hours.

6.

You have formed yourselves into subsystems; various of you have requested the services of some of the Consultants. You have undertaken interactions among yourselves, among the subsystems, and with Management.
Some of you have shared with us the role of manager.

7.

This relatedness has been of a political, psychic, and spiritual order.
The interactions have often taken on concrete forms, but they have also assumed less than strictly material forms.

8.

But the ISE is not yet finished.

It continues to unfold at this very moment, and the political, psychic, and spiritual relatedness between Members and Management are not only still present, but are still capable of being transformed.

9.

Therefore, I propose, on behalf of Management, the primary task of the closing plenary of the ISE:

> ***To explore the nature of the psychic, political, and spiritual dimensions of relatedness between the Members and Management of the ISE, all the while knowing that they will come to an end at the closing of this session.***

10.

What would you like to explore?